



**MANUAL FOR  
EXAMINATION OF PATIENTS**



# MANUAL FOR Examination of Patients

SCHOOL OF MEDICINE  
*and* NORTH CAROLINA MEMORIAL  
HOSPITAL THE UNIVERSITY of  
NORTH CAROLINA, *Chapel Hill, N C*

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# Preface

This Manual has been prepared and edited by an interdepartmental committee of the faculty for the use of students, house officers and staff of the University of North Carolina School of Medicine and the North Carolina Memorial Hospital. It reflects a general philosophy of patient care and describes the most important aspects of interviewing and physical examination and the principal laboratory procedures utilized.

The first mimeographed version to which members of the faculty contributed was compiled by 2 of us (DRH and KLV) in 1954. It attempted to satisfy 2 unmet needs: (1) the singular paucity of material in the textbooks of physical diagnosis on interviewing and history taking, probably the most important components of the diagnostic process; and (2) the need to integrate certain important parameters of advancing knowledge in psychiatry, preventive medicine, and the behavioral sciences into the broad stream of contemporary medicine. Both the over-all approach and the particular concepts in Appendices A, 1-5 have been strongly influenced by the work of Dr. George Engel of the University of Rochester.

Experience with the first version of the Manual disclosed the need to broaden its scope so that it would be applicable to all clinical services, in addition to medicine and psychiatry. It was also considered desirable to include outlines for examination in more specialized areas, as well as information about the use of clinical laboratories, and finally there was an obvious need to publish the Manual in a pocket-sized format. The second version, published privately by the School of Medicine in 1957, was prepared by an interdepartmental committee, but particularly valuable contributions were made by the late Dr. Deborah Leary in editing Part II, Laboratory Examinations and Procedures, and by Dr. Nelson K. Ordway, now of Yale University, in Part I, Section 3, Special Features of the Evaluation of Children, and Appendix D, 2, Developmental Ap-

praisal of Infants and Young Children as well as in extensive editorial assistance Dr Hughes Bryan and Miss Frances Mackinnon of the School of Public Health University of North Carolina prepared Appendix D 1 Nutritional History Taking and Dr R S Burge of Des Moines Ia gave permission to use his chart Clinical Analysis of Transfusion Reactions Dr Price Heusner Dr Richard Peters Dr Janet Fischer Dr Harvey Smith Dr William Cromartie Dr J G Palmer Dr George Penick Dr Thomas Farmer Dr Robert Brashear Dr John Sessions Dr Oscar Sapp, Dr Ernest Craige Dr Norman Allen as well as many other members of the faculty made important contributions

The second version of the Manual was used throughout the Medical School and the North Carolina Memorial Hospital for 3 years and attracted interest in other schools The need for further revision and the offer of the Year Book Publishers to publish the Manual have resulted in the present edition from which local references to practices at the University of North Carolina have been deleted

It is hoped that students house officers and faculty using the Manual will give the editorial committee the benefit of their comments on both form and content so that future editions may be improved

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Chapel Hill  
April 1 1960

# Table of Contents

## PART I

### HISTORY TAKING AND EXAMINATION

1	INSTRUCTION FOR MEDICAL RECORDS	11
2	BASIC OUTLINE OF HISTORY AND PHYSICAL EXAMINATION	13
3	SPECIAL FEATURES OF THE EVALUATION OF CHILDREN	22
4	APPENDICES	26
A.	THE HISTORY	28
1	An Approach to the Patient	28
2	The Present Illness	33
3	The Family History	39
4	The Socio Environmental History	41
5	The Review of Systems	43
B	THE PHYSICAL EXAMINATION	51
C	SUMMARY DIAGNOSES AND MANAGEMENT PLANS	55
D	SPECIALIZED AREAS OF HISTORY TAKING EXAMINATION	58
1	Nutritional History Taking	58
2	Developmental Appraisal of Infants and Young Children	61
3	Neurologic Examination	72
4	Orthopedic Examination	82
5	Emergency Examination	86
6	Evaluation of the Psychotic Patient and the Mental Status Examination	97



7	Evaluation of the Comatose Stuporous or Uncooperative Patient	103
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## PART II

## LABORATORY PROCEDURES AND EXAMINATIONS

1	HEMATOLOGIC PROCEDURES	113
2	URINE	137
3	GASTRIC AND DUODENAL CONTENTS	150
4	STOOL	156
5	CEREBROSPINAL FLUID	160
6	PLEURAL PERICARDIAL PERITONEAL AND SYNOVIAL FLUIDS	165
7	SKIN TESTING	167
8	MICROBIOLOGIC EXAMINATIONS AND COLLECTIONS	169
9	SEROLOGIC TESTS	180
10	COLLECTION OF SPECIMENS FOR VIRUS STUDIES	182
11	USE OF THE BLOOD BANK	184
12	USE OF THE CLINICAL CHEMISTRY LABORATORY	189
13	ENDOCRINE EXAMINATIONS	195
14	SPECIMENS FOR CYTOLOGY AND PATHOLOGY LABORATORIES	199
15	CIRCULATION TIME AND VENOUS PRESSURE	203
	INDEX	215

PART I

History-Taking and  
Examination



# 1 Instructions for Medical Records

An important function of a hospital is to maintain on all patients records that are adequate accurate and easily utilized. The case history is a compendium of all the data on a patient obtained by students nurses house officers consultants and technicians. It is not only the prime document which records the facts and opinions relating to diagnosis and treatment of the patient's illness it is also a legal document and the source of data used for research of many types. Discretion should be used in recording information which may be embarrassing to the patient unless its omission will jeopardize adequate patient care. The following entries are customarily made:

## ADMISSION NOTE

At least a 1 page statement should be made on the patient's chart shortly after admission. This note includes:

- 1 a brief summary of the presenting problem,
- 2 the salient historical features
- 3 the important physical findings
- 4 the initial impression and
- 5 the immediate plan of management

## COMPLETE HISTORY AND PHYSICAL EXAMINATION

It is expected that patients will be seen promptly after admission and that the initial interviews and physical examinations will be completed on the day of admission. The records should be completed and included in the chart by the morning after admission to the hospital or in the case of an outpatient or a critically ill hospital patient the day the patient is seen. The outline which follows indicates the form these records

should take The appropriate special section should be consulted if the patient is a child presents an emergency appears psychotic or is comatose

### PROGRESS NOTES

Appropriate notes should be made describing progress in diagnosis any change in the course of the illness or its management and understanding of the patient For critically ill patients notes may be required from hour to hour

### OPERATIVE NOTES

Brief notes describing any procedure or minor operation performed on the ward should be made promptly A short description of any surgical procedure should be recorded before the patient leaves the operating room This should include the nature of the procedure pertinent findings the names of the operators the anesthesia used parenteral fluids given and condition of the patient on completion of the procedure A complete operative note should be dictated promptly by the surgeon in charge

### DISCHARGE SUMMARY

This is the responsibility of designated house officers on the various services It should be dictated promptly in order that the referring physician may have the benefit of the service's recommendations for the patient's future care The summary should mention briefly the salient points of the history physical examination diagnostic procedures consultations medications operations or other therapeutic procedures course in the hospital final diagnosis discharge treatment and recommendations and arrangements for follow up visits Copies of the discharge summary are sent to the referring physician the attending staff physician and interested consultants Discharge summaries provide the house officer with a useful cumulative record of his clinical experience

## 2 Basic Outline of History and Physical Examination

This outline should serve as a guide for the consistent and systematic recording of initial data pertaining to the patient. While the acquisition of historical and physical data should never follow a rigid pattern, their recording and presentation should be reasonably complete and conform to a conventional orderly arrangement. Emphasis in the evaluation and its recording will vary with the patient, his problem, and the clinical service, as well as with the physician and his proficiency. Additional information will often be required in the area primarily affected, and the detailed sections on history taking and physical examination, as well as the other appendices, should be consulted for assistance.

Abbreviations other than those found in standard texts should not be used.

Organize the patient's history before writing it. A better conception of the history will be gained and time and writing will be saved.

### HISTORY

#### Introductory Information

Record the patient's name, age, sex, ethnic extraction, marital status, occupation, place of residence, and referring physician. Identify the time and place of examination and record the name and rank or status of the examiner. Is this the patient's first visit to this hospital? If he has had previous admissions or clinic visits, what is the number of the present one? The source of the information should be stated and an appropriate statement made as to its presumed reliability.

### 1 Chief Complaint

A brief statement in his own words if possible of what concerns the patient most and how long he has been ill

### 2 Present Illness

When, why and how did the patient become ill? This should be a detailed but concise chronological account of all historical information directly relevant to the onset and course of the illness. The patient's concept of his illness and what he hopes to gain from his visit should be recorded

### 3 Family History

- A **FAMILY BACKGROUND** A statement about the patient's parents and other members of his early household. Ages of parents, state of health, past physical and emotional illnesses and important events with patient's age at the time.
- B **SIBLINGS** Number of mother's pregnancies, number of siblings, sex, state of health, illnesses or other problems, patient's position in sibling group.
- C **MARITAL HISTORY** A statement about the patient's spouse and children including ages, state of health, illnesses or other problems and emotional relationships.
- D **FAMILIAL INCIDENCE** of allergy, arthritis, bleeding disorders, cancer, diabetes mellitus, epilepsy, hypertension, kidney disease, migraine, nervous or mental disorders, peptic ulcer, rheumatic fever, tuberculosis and other dominant patterns of illness.

### 4 Socio environmental History

- A **SCHOOLING, RELIGIOUS ACTIVITY AND MILITARY SERVICE** should be described when pertinent.
- B **OCCUPATIONAL HISTORY** Describe the patient's activities both in and out of the home including recreational interests. Note how the patient's work may have played a part (toxins, tensions, trauma) in his illness and how his illness may in the future affect his customary activities.

- C **LIVING ARRANGEMENTS** A statement about the physical and social aspects of the patient's living quarters
- D **SPECIAL FEATURES RELATED TO THIS ILLNESS** Include a consideration of finances changes in home and work sexual outlets use of drugs or alcohol and the major ways of reacting emotionally to this illness

## 5 Past Medical History

- A **GENERAL HEALTH AND STRENGTH** How does the patient evaluate himself? Would he rate his experience and capacity as average below or above average?
- B **BIRTH AND EARLY DEVELOPMENT** A statement about birth feeding growth behavior and environment with emphasis on major events and interpersonal relationships during the patient's early years
- C **PAST ILLNESSES COMMUNICABLE OR OTHERWISE** Childhood diseases and sequelae communicable diseases previous hospital admissions immunizations allergic or hypersensitivity reactions including drug reactions
- D **OPERATIONS INJURIES ACCIDENTS** Give the date circumstances and nature of surgical procedures A comment regarding type of anesthesia may be of value Functional results should be noted
- E **DRUGS MEDICATIONS HABITS** Note any drugs or medications taken regularly or frequently Inquire about tea coffee soft drinks alcohol tobacco and laxatives

## 6 Review of Systems

This section constitutes a brief review of pertinent symptoms and signs which may reflect underlying diseases Only abnormal symptoms signs and pertinent normals should be recorded

- A **SKIN HAIR NAILS** Changes in character consistency or pigmentation pruritus eruptions hives sores
- B **HEAD** Characterize headaches vertigo syncope trauma
  - 1) *Eyes*—visual acuity corrective lenses photophobia diplopia inflammation
  - 2) *Ears*—pain discharge deafness tinnitus



### 1 Chief Complaint

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- B **SIBLINGS** Number of mother's pregnancies number of siblings sex state of health illnesses or other problems patient's position in sibling group
- C **MARITAL HISTORY** A statement about the patient's spouse and children including ages state of health illnesses or other problems and emotional relationships
- D **FAMILIAL INCIDENCE** of allergy arthritis bleeding disorders cancer diabetes mellitus epilepsy hypertension kidney disease migraine nervous or mental disorders peptic ulcer rheumatic fever tuberculosis and other dominant patterns of illness

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## 5 Past Medical History

- A **GENERAL HEALTH AND STRENGTH** How does the patient evaluate himself? Would he rate his experience and capacity as average below or above average?
- II **BIRTH AND EARLY DEVELOPMENT** A statement about birth feeding growth behavior and environment with emphasis on major events and interpersonal relationships during the patient's early years
- C **PAST ILLNESSES COMMUNICABLE OR OTHERWISE** Childhood diseases and sequelae communicable diseases previous hospital admissions immunizations allergic or hypersensitivity reactions including drug reactions
- D **OPERATIONS INJURIES ACCIDENTS** Give the date circumstances and nature of surgical procedures A comment regarding type of anesthesia may be of value Functional results should be noted
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- II **HEAD** Characterize headaches vertigo syncope trauma
  - 1) *Eyes*—visual acuity corrective lenses photophobia diplopia inflammation
  - 2) *Ears*—pain discharge deafness tinnitus

3) *Nose*—epistaxis discharge obstruction sinusitis sense of smell

4) *Mouth and throat*—status of teeth gums dentures sores or leukoplakia sore throats hoarseness tonsillectomy adenoidectomy

C **RESPIRATORY** Cough hemoptysis sputum amount and character use of tobacco or other respiratory irritants chest pain dyspnea cyanosis tuberculosis asthma pneumonia dates of all chest x rays

D **CIRCULATORY** Angina symptoms of congestive failure exertional dyspnea orthopnea edema, arrhythmias peripheral vascular disease blood pressure changes

E **GASTROINTESTINAL** Appetite hours and habits of eating dysphagia vomiting jaundice bowel habits diarrhea constipation character of stools blood in stools abdominal pain

F **URINARY** Frequency urgency nocturia dysuria pyuria hematuria colic hesitancy dribbling incontinence calculi enuresis

G **REPRODUCTIVE** *In the female*—Menarche menstrual history pregnancies abnormal pain vaginal bleeding or discharge breasts venereal disease frigidity or impotence Date of last menstrual period and previous menstrual period *In the male*—note especially libido potentia (capacity for sustained erection and satisfactory orgasm) and fertility

H **MUSCULOSKELETAL** Deformities arthritis fractures pain limitation of motion weakness wasting or tremors

I **NEUROLOGIC** Headaches syncope seizures aphasia loss of sensation pain ataxia weakness or paralysis

J **HEMOPOIETIC** Anemia transfusions hematuries abnormal bleeding or bruising lymphadenopathy

K **METABOLIC AND ENDOCRINE** Growth and development normal weight and major fluctuations temperature intolerance nervousness sweating glycosuria polydipsia polyuria voice change change in hair distribution or amount

L **PSYCHOLOGIC** Childhood behavioral problems nervous breakdowns anxiety depression irritability insomnia alcoholism psychosexual adjustment and maturity

## PHYSICAL EXAMINATION

This is an objective record of the physician's measurements and observations in contrast to the historical record provided by the patient. Record 1 word or more for each major heading but these may be limited to abnormal findings and pertinent normal features. Diagrams or charts frequently are helpful in describing observations and localizing findings.

### 1 Vital Signs

Temperature pulse rate respiratory rate blood pressure (indicate position and arm) Also record height and weight when possible

### 2 Appearance and Behavior

This should be an accurate description of the patient as an individual including the following information

- A MENTAL STATE State of consciousness orientation mood attitude attention memory
- B LANGUAGE Quality of speech content coherence
- C POSTURE Position in bed dress and appearance
- D PHYSIQUE Constitution nutritional status hydration color edema if present
- E APPARENT SEVERITY AND DURATION OF ILLNESS
- F ATTITUDE AND EMOTIONAL STATE in relation to illness and to the examiner

### 3 Integument

- A SKIN Complexion texture turgor pigmentation eruptions petechiae tumors or nodules
- B NAILS Color clubbing
- C HAIR Color texture distribution

### 4 Lymph Nodes

- A GENERAL Local or generalized enlargement discrete or matted mobility tenderness
- B LOCATION Anterior and posterior cervical pre and post auricular occipital supraclavicular axillary epitrochlear iliac inguinal femoral

**5 Head**

- A. SCALP Tenderness scars
- B. SKULL Configuration depressions or exostoses

**6 Eyes**

- A. GENERAL Exophthalmos ocular tension
- B. LIDS Ptosis lid lag
- C. SCLERAE Jaundice hemorrhages
- D. CONJUNCTIVAE Pallor injection petechiae
- E. CORNEA Scars ulcerations arcus senilis
- F. PUPILS Size shape equality reaction to light and in accommodation extra ocular movements
- G. VISION Acuity visual fields by confrontation color perception If glasses are worn, note defect and type of correction
- H. FUNDI Optic discs arteries hemorrhages exudates

**7 Ears**

- A. EXTERNAL Tophi, discharge
- B. INTERNAL Canal walls tympanic membranes fluid behind drums
- C. AUDITORY ACILITY Bone vs air conduction

**8 Nose**

Shape septum congestion discharge polyps patency of airways sinus tenderness transillumination

**9 Mouth and Throat**

- A. GENERAL Breath hygiene
- B. LIPS Color cyanosis cheilosis herpes
- C. TEETH Number caries dentures
- D. MUCOUS MEMBRANES AND GINGIVAE Pallor ulceration, pigmentation enanthem
- E. TONGUE Color papillary atrophy deviation tremor ulceration
- F. PHARYNX Tonsils epiglottis palatal movement

**10 Neck**

- A GENERAL Mobility meningismus
- B BLOOD VESSELS Engorgement of veins carotid pulsations abnormal pulsations scars
- C THYROID Size nodules bruit
- D TRACHEA Position tracheal tug

**11 Breasts**

Symmetry masses scars nipples secretion pigmentation tenderness

**12 Chest and Lungs**

- A INSPECTION Shape symmetry contour of rib cage anterior posterior diameter expansion (note quality of expansion)
- B PALPATION Tactile fremitus
- C PERCUSSION Resonance descent of diaphragm supraclavicular spaces
- D AUSCULTATION Breath sounds prolongation of expiration rales rhonchi post-tussive rales friction rub

**13 Heart**

- A INSPECTION Pulsations apical impulse precordial bulge
- B PALPATION Confirm position of apical impulse thrills sounds
- C PERCUSSION Map out heart size and other densities
- D AUSCULTATION Rate rhythm sounds gallop rhythm murmurs friction rubs

**14 Abdomen**

- A INSPECTION Shape scars veins peristalsis
- B PALPATION Liver spleen kidneys colon bladder uterus tenderness rebound tenderness and referred rebound tenderness costovertebral angle tenderness tone (spasm involuntary guarding rigidity) masses hernias
- C PERCUSSION Liver spleen and bladder shifting dullness fluid wave tympany size and shape of masses

- D AUSCULTATION** Peristalsis gastric succussion splash  
**II OTHER SIGNS OF PERITONEAL IRRITATION** Obturation  
 psoas spasm

## 15 Genitalia

- A MALE** Distribution and amount of pubic hair fore skin (circumcised?) adhesions penile scars inflammation discharge urethral stricture testes and epididymes size masses descent varicocele hydrocele  
**II FEMALE** Distribution and amount of pubic hair external genitalia size of clitoris glands urethra introitus pelvic relaxation inflammation discharge vagina cervix, uterus adnexa

## 16 Anus and Rectum

Sphincter tone hemorrhoids prolapse fissure fistula prostate masses presence or absence of blood on examining finger

## 17 Extremities

- A. UPPER** Color of palms moisture joint swelling inflammation deformity fractures irregularities limitation of function nodules  
**B LOWER** Equality of leg lengths mobility swelling inflammation deformity of joints fractures measure circumference and length of extremities when indicated

## 18 Peripheral Vessels

Palpate and describe major vessels and describe amplitude character and equality of pulsations (note particularly posterior tibial and dorsalis pedis arteries) color and temperature of feet edema varicose veins venous engorgement abnormal vascular patterns thrills bruit

## 19 Back and Spine

Posture mobility curvature tenderness root pain meningismus pilonidal sinus

## 20 Nervous System

- A **CRANIAL NERVES** Brief survey numerically unless performing a detailed formal neurologic examination in which case consult Appendix D 3
- B **MOTOR SYSTEM** Muscle tone, strength wasting contracture fasciculation involuntary movements power spasticity clonus
- C **REFLEXES** Deep tendon reflexes superficial and plantar reflexes abnormal signs (Babinski Hoffman Chvostek Trousseau etc )
- D **SENSATION** Touch pain vibration joint position Romberg's sign
- E **COORDINATION** Stance ataxic spastic or festinant gait
- F **AUTONOMIC NERVOUS SYSTEM** Sweating flushing blanching

## PRELIMINARY LABORATORY STUDIES

The initial hematologic studies urinalysis stool examination for occult blood and emergency studies bearing on the initial working diagnoses and management should be recorded

## SUMMARY OF POSITIVE FINDINGS AND FORMULATION

This should consist of a brief paragraph in which significant historical and objective features are discussed together with a statement about the patient's personality and his reaction to the situation (See Appendix C )

## WORKING DIAGNOSES

Diagnoses are tentative and based on the history physical examination pertinent preliminary laboratory studies and any other information which may affect the patient

## PLAN OF INVESTIGATION AND TREATMENT

Plans for the further study and management of the patient's problems should be outlined in order of decreasing importance Unusual procedures should be justified briefly (See Appendix C )



- D AUSCULTATION Peristalsis gastric succussion splash
- E OTHER SIGNS OF PERITONEAL IRRITATION Obturation  
psoas spasm

## 15 Genitalia

- A MALE Distribution and amount of pubic hair fore skin (circumcised?) adhesions penile scars inflammation discharge urethral stricture testes and epididymes size masses descent varicocele hydrocele
- B FEMALE Distribution and amount of pubic hair external genitalia size of clitoris glands urethra introitus pelvic relaxation inflammation discharge vagina, cervix, uterus adnexa

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## 19 Back and Spine

Posture mobility curvature tenderness root pain meningismus pilonidal sinus

## 2. Nervous System

- A. Cerebral Nerves: Brief survey noticeable unless performing a detailed formal neurological examination, in which case consult Appendix D-3
- B. Motor System: Muscle tone, strength, wasting, cramps, etc. Involve in voluntary movements power symmetry, etc.
- C. Reflexes: Deep tendon reflexes, superficial and plantar reflexes abnormal signs (Babinski, Hoffman, Chaddock, Triceps, etc.)
- D. Sensory: Touch, pain, vibration joint position, Romberg's sign
- E. Coordination: Gait, stance, spatio-orientation, etc.
- F. Autonomic Nervous System: Sweating, flushing, blushing

## PRELIMINARY LABORATORY STUDIES

The usual laboratory studies, analysis, et al examination of blood, urine, and stool, and studies bearing on the usual chronic diseases and management should be recorded.

## SUMMARY OF POSITIVE FINDINGS AND FORMULATION

The chief feature of a brief paragraph in which significant physical and other findings are discussed, together with a brief statement about the patient's personal and his reaction to the situation. See Appendix C.

## WORKING DIAGNOSES

Diagnosis is tentative and based on the history, physical examination, pertinent preliminary laboratory studies and any other information which may affect the patient.

## PLAN OF INVESTIGATION AND TREATMENT

Plans for further work and management of the patient's problems should be outlined in order of decreasing importance. Current procedures should be listed briefly (See Appendix C).

# 3 Special Features of the Evaluation of Children

## INTRODUCTION

The evaluation of children is distinctive in that—

- 1 The history is obtained second hand
- 2 Parental concern introduces bias to medical information being sought.
- 3 Due to the child's complete dependence the doctor must understand and enlist cooperation of the parents
- 4 The velocity of certain disease processes is variable depending on such factors as the resilience of youth the status of immunity the reserve function of organ systems past experience etc
- 5 There is increased emphasis put on early recognition anticipation, and prevention of disease
- 6 A search is made for factors affecting optimal emotional neurologic, and physical growth and development

## THE PEDIATRIC HISTORY

Actually the emphasis and detail of the initial pediatric history vary greatly with the presenting problem i.e. (1) emergency hospital admission (2) elective hospital admission (3) outpatient diagnostic work up or (4) well baby supervision. Certain situations require exhaustive inquiry at the time of the initial visit (especially when the informant may be absent later on) in others an adequate history is obtained only after repeated contact. The history must be regarded as a flexible dynamic aid in the management of the patient. The doctor must adapt to the situation keeping 2 basic goals in mind (1) establish a sound working relationship with parents and child (2) assemble the information pertinent to meeting the needs of the child

To achieve these basic goals in the wide gamut of problems that occur in pediatrics the doctor must be tactful perceptive and above all an attentive listener. Often important information particularly in emotional problems can be uncovered most easily when the child is being entertained outside. Thus the informant is not distracted or reluctant to discuss the problem fully. Tactful inquiry into the family's philosophy and practices regarding the patient's feeding toileting disciplining and sleeping may reveal the crux of the problem to both doctor and parents.

The record of the present illness is composed *after* all available information has been considered to depict *logically concisely* and *chronologically* a picture of the disease process. The concluding paragraph should give a summary of information pertinent to a consideration of the differential diagnosis. The historian must decide whether information of borderline importance adds sufficiently to the comprehension of the patient's problem to be included in the present illness or not (and therefore relegated to the past history).

Additions to or correction of the record of the present illness are frequently necessary and should be made either as progress notes or amendments to the original history in the form of dated and signed marginal notes.

The recorded history is modified from the Basic Outline in the following respects:

## 1 Chief Complaint and Present Illness

In the case of sick children there is no deviation from the usual form. Well children frequently have no Present Illness. Usually one includes an initial paragraph indicating the stated reason for the visit and noting any queries raised by the informant. The actual cause for concern may not be immediately apparent to either the interviewer or the informant.

## 2 Family History

Inseparable from socio-environmental history

### A MEDICAL

#### 1) Parents—age and health

- 2) *Record of mother's pregnancies names ages and health of siblings*
- 3) *Familial diseases as listed on page 40 and congenital anomalies muscular dystrophies deaths in early infancy The family tree approach is preferable when exhaustive inquiry is indicated*

### **II THE FAMILY UNIT**

- 1) *Members of patient's household note ethnic and cultural extraction If home is broken what is relation to it of absent members?*
- 2) *Changes in family structure (e.g. new additions deaths) as related to age and adjustment of patient*
- 3) *Changes in dwelling place as related to age and adjustment of patient*
- 4) *Patterns of family living—religion discipline amusements use of alcohol etc*
- 5) *Nature of interpersonal relationships—relation of parents to each other attitude of parents to child attitude of child to parents*

### **C SOCIO-ENVIRONMENTAL STATUS**

- 1) *Description of home—number of rooms bathroom toilet sleeping facilities screens*
- 2) *Description of neighborhood*
- 3) *Financial situation*
  - a) *Occupation of father—type of work salary steadiness of income*
  - b) *Occupation of mother—if working who looks after the family*
  - c) *Other sources of income medical insurance*
  - d) *Others supported by this family*
- 4) *Sources of milk and water*

## **3 Past History (includes Review of Systems)**

A chronological statement of normal and abnormal development prophylactic measures and illnesses organized according to the following plan in such detail as is appropriate to the age of the child

**A PRENATAL** How did mother feel during pregnancy optimistic and active or discouraged and weak? When was prenatal medical supervision begun? General state of maternal health—diet weight gain blood type (in

cluding Rh) and serology anemia medication Complications (give approximate dates) (1) emesis and dehydration (2) illnesses and infections (3) irradiation (4) vaginal bleeding (5) operations—anesthesia (6) injuries—shock (7) albuminuria edema hypertension (8) premature labor

- B BIRTH** Place duration of gestation type of delivery duration of labor birth weight immediate complications (apnea cyanosis hemorrhage obvious injury)
- C NEONATAL** Weight loss early weight gain circumcision complications (jaundice pallor cyanosis hemorrhage rash convulsions infection diarrhea vomiting fever)
- D FEEDING** Early adjustment breast or bottle—reasons for early change type and amount of formula vitamins and other supplements solids weaning Present diet
- E GROWTH AND DEVELOPMENT** Gain in weight and height age in months when baby smiled responsively rolled from supine to prone sat unsupported pulled self to standing position said 3 words walked unaided achieved diurnal and nocturnal sphincter control handling of toilet training by parents adequacy of present speech development in relation to other children present grade in school (if behind for age why?) signs of adolescence
- F PROPHYLAXIS AND SKIN TESTS** Time (age) of initial immunizations and boosters diphtheria pertussis tetanus smallpox poliomyelitis typhoid fever influenza other Dates of and reasons for gamma globulin anti tetanus serum Dates and results of tuberculin and other skin tests Reactions to any of these?
- G ILLNESSES**
- 1) *Childhood diseases and sequelae*—chickenpox German measles measles scarlet fever and other streptococcoses exanthem subitum mumps whooping cough
  - 2) *Other communicable diseases*—including impetigo meningitis encephalitis infections of eyes ears nose and throat, cervical adenitis croup pneumonia gastroenteritis diarrhea intestinal parasites fever glandular enlargement jaundice inquire specifically concerning growing pains rheumatic fever nephritis urinary tract infections
  - 3) *Accidents poisonings operations*

4) *Allergies drug reactions*—what drugs has the child received?

H **PERSONALITY AND BEHAVIOR** General statement eating habits sleeping habits behavior at home and with other children adjustment at school Crying thumb-sucking enuresis and encopresis nail biting tantrums jealousies

I **REVIEW OF SYSTEMS** See Pages 15 and 16 and Appendix A 5 page 43

## PHYSICAL EXAMINATION OF CHILDREN

Cooperation by a young child during physical examination though not always possible is usually obtained by gentleness and understanding One should carry out the least disturbing features—palpation of the abdomen examination of the chest—first (frequently with the child in the mother's lap) and reserve the most unpleasant procedures such as examination of the throat and ears and most measurements for last Brennemann's *Practice of Pediatrics* Volume I Chapter 19 is recommended as a reference

The general form of recording the Physical Examination is followed Certain features deserve special comment

### 1 Measurements

In addition to vital signs record weight crown heel length (under 3 years) height (6 years and over) greatest head circumference (under 3 years), thorax circumference at xiphoid and crown rump length (under 6 months) Indicate percentile for each measurement include appropriate ones on special pediatric growth chart

### 2 Appearance and Behavior

In the case of well infants and young children this includes a quasi objective developmental appraisal (See Appendix D 2) In newborns describe position of comfort The appearance and activity of infants should be observed while they are completely naked

### 3 Head

In infants describe appearance (shape relative size) cranio-tables bossing fontanelles (size tension) sutures In newborns describe molding caput succedaneum cephalhematoma

#### 4 Chest

Note costochondral junctions

#### 5 Genitalia

*Male infants* palpate for thickened spermatic cord containing peritoneum (hernia) *Female infants* look for filmy posterior synechia of labia minora

#### 6 Anus and Rectum

Digital examination ■ done only on special indication

#### 7 Extremities

Palpate simultaneously radial and femoral arteries in young infants check for symmetrical abduction of flexed hips



## APPENDIX A

# The History

### APPENDIX A 1

## An Approach to the Patient

Health and disease may be regarded as 2 phases of the life long process of adaptation. When a patient consults a physician unless it be for a routine examination it is because he has perceived or fears some disturbance in his well being and it is the task of the physician to determine insofar as possible the nature of this imbalance and to help the patient in achieving his best level of adjustment. Implicit in this approach is the concept that the individual functions at many levels of adaptation which are mutually interdependent and that he may or may not be aware of the primary level of decompensation. This may be at the enzymatic cellular organ humoral neurologic psychologic or social levels. A disturbance at one level influences adjustments at other levels and necessitates some evaluation of the adaptive processes utilized by the patient at all levels. Considered in more humanistic terms it is the doctor's function to understand to alleviate suffering and to help restore function and where possible to prevent illness and improve health standards.

The achievement of these goals depends primarily on the physician's ability to understand and manipulate the physician-patient relationship to the maximum advantage of the patient. This relationship is initiated during their first meeting and consists of the interview and the physical examination. At one time the interview was regarded merely as an opportunity for fact finding and the physician tended to conduct it in a stereotyped question and answer fashion but the complexity of the human organism makes it impossible to cover all the important

areas by this technique. Moreover the patient usually has little understanding of the real basis for his symptoms and difficulties and in addition much of the physician's information is derived from the manner in which the patient presents himself and tells his story.

When a patient initially meets a physician or enters the hospital he is anxious, puzzled and wonders what is to happen to him and his personal affairs. Some patients have procrastinated for weeks or months before consulting a physician; others have developed anxiety and terror in response to minimal stimuli. Whatever its sources the anxiety is usually accompanied by the wish to be helped by some powerful authoritarian figure, by feelings of guilt and by a resurgence of old and frequently childish attitudes. These and many other feelings and attitudes interfere with the patient's capacity to tell his story in a calm, logical, coherent fashion. The initial goal of the interview therefore is to establish an appropriate relationship with the patient—to develop rapport—so that the patient and physician may communicate effectively. It is necessary for the physician to realize that he is both a participant and an observer and the manner in which the interview proceeds therefore will be not only a function of the patient and his problems but also a function of the physician and his attitudes.

It is of prime importance that the doctor have an attitude which generates confidence and understanding. He should convey to the patient the impression that he has ample time and that he is interested in him as an individual and not just as another case or disease. However rushed the physician may be, time will be saved in the long run if the patient feels that the physician is unhurried. Important symptoms, fears and problems frequently are revealed by the patient only when he feels that the physician has time to listen. So far as possible the interview should be conducted in complete privacy and under the pleasantest conditions and surroundings available. Patients in wards or semiprivate hospital beds should be taken to a private examining room for the interview whenever possible. Taking of notes in the presence of the patient is to be avoided if possible; if necessary to the examiner it is helpful to discuss it with the patient and then make the recording of notes as unobtrusive as possible.

The second purpose of the interview is the appraisal of the patient and his problems. This is based initially on the medical history which in essence is a brief biography of the patient's life and is the major source of information leading to the diagnosis of the disease, understanding of the person and the treatment of the patient and his illness. The accuracy of diagnosis frequently depends upon the quality of the history and the competence with which the interview is conducted. These in turn are a function of the physician's knowledge of disease and human behavior and of his skill in eliciting information from the patient.

After the opening amenities and with the patient as comfortable as possible, it is appropriate to begin the interview by such questions as: "What brings you to the hospital?" "What seems to be the trouble?" or "How may we help you?" It usually is wise to avoid negative approaches such as: "What is wrong with you?" or "What is the matter with you?" because of the critical, alarming or moralizing connotations. From the patient's viewpoint, the telling of his life story is an intense personal experience which may be filled with anxiety and guilt or relief and pleasure. It is important therefore to allow the patient to tell his story with as few interruptions as possible. Some patients may however require more skillful guidance and questioning.

The physician should be alert not only to the actual content of what the patient says, but also to the manner of presentation and the behavior and appearance of the patient at the time. Often relationships are revealed by the order in which the patient presents material. The fact that 1 topic leads to another suggests that there is some connection between them, even though the patient is unconscious of any association. The physician should note obvious omissions of pertinent material or persons from the history. Emotionally charged material will be indicated by various behavioral mannerisms of the patient such as blushing, stammering, slips of the tongue, pauses, evasions, vagueness of detail, etc. It is well to remember that the primary stress, whether it be a bacterial invasion, the ingestion of a poison, the growth of a tumor, or the presence of an intolerable aggressive impulse, usually is unknown to the patient, and hence the physician is constantly seeking the indirect evidence of its presence. The examiner then must

constantly pick up clues from what the patient says how he behaves as he says it and what he fails to say

As experience in clinical medicine grows the interview becomes a deductive process in which the physician forms hypotheses gathers evidence and follows the leads which confirm or negate the hypotheses As he proceeds he organizes a preliminary differential diagnosis on which to focus later attention This type of interviewing becomes a much more active process than the mere accumulation of data Activity during the interview should not be equated with more vigorous questioning or participation by the physician The skilled physician spends most of his time listening to the patient and very little in talking himself He has become sufficiently familiar with sick people to know what questions to ask and when and how to ask them Skill in maintaining both control and flexibility during the interview should be learned and perfected Frequently a glance a lift of the eyebrows or the repetition of a key word will be sufficient to lead the patient into pertinent discussion of an important area With experience in interviewing significant data about the present illness past history the patient's interpersonal relationships his feelings about his illness and other significant details will be obtained

Toward the conclusion of the interview it is usually necessary to review the history fill in details about certain areas ask specific screening questions and follow up leads which the patient has provided There will be many occasions especially relating to primarily organic diseases when it is pertinent to ask highly specific direct questions For example in the case of a fracture it is necessary to obtain a precise description of the location and type of pain whether or not there is any disturbance of sensation peripherally where and when the accident occurred whether there has been a history of frequent fractures etc Other screening questions will be asked during the review of systems this may be done either during the course of the interview or at the time of the physical examination Rapport between the physician and patient tends to be intensified by the close physical contact of the examination and further questioning at this time is often productive It is important to observe the patient's behavior during the physical examination in addition to the particular area being examined

The third part of the interview may be thought of as motivating the patient to continue the physician patient relationship for the purpose of further evaluation and therapy. At the end of the interview then the patient's attention should be again focused on the presenting complaints and the patient should be given an opportunity to ask questions or add any additional information. At this time it is generally useful to ask the patient to express his opinion about his problem. Frequently patients reply by saying "Well you're the doctor." To this the physician may reply "Yes but you are the one who has dealt with this problem for the longest period of time and in many ways may know the most about it." The physician should avoid giving premature reassurance, judgment and interpretations in the long run this usually tends to diminish rather than strengthen confidence in the physician. It is of great importance to leave the patient with the feeling that it may be important to talk further about his difficulties. Before the interview is closed he should have some clear understanding of future plans for the relationship and an indication of continued interest on the physician's part.

It is usually advisable to interview 1 or more of the patient's relatives to obtain confirmatory data or fuller explanations. They may be able to provide further information about symptoms, treatment and behavior of which the patient is unaware. In addition it frequently will be important to have the family's full cooperation in the management of the patient after he leaves the hospital.

The medical history is a literary composition involving the organization and presentation of data in clear, scientific, logical and concise form. It should also be an interesting human document and may utilize many of the patient's own words in quotation marks. It is improper to employ humorous or undignified language and it is important to remember that the record is a formal legal document which may be subject to summons by courts of law. The history cannot be written from a completely objective point of view since the physician is attempting to concentrate and arrange systematically the varied information available. Pseudoscientific documentation should be avoided but precision and accuracy are desirable. The bulk of the data in the history are derived ultimately from what the patient or his relatives communicate to the physician and are

subject to wide variations of human error and distortion. It is the physician's task to interpret the meaning of the patient's communications nonverbal as well as verbal to establish the significance of the relationship that exists between seemingly unrelated facts and to construct from this a reasonably systematic and coherent story.

## APPENDIX A 2

# The Present Illness

### GENERAL

This section should attempt to answer the questions: When, why and how did the patient become ill? It is essential to date the onset of the present illness as clearly as possible whether this be 30 years or 2 hours before admission and this time should be used consistently throughout the history. If the patient has had previous admissions to the hospital these should be summarized concisely in chronological order. When the admissions relate to the Present Illness a subheading—Previous Hospitalizations—is indicated at the beginning of the Present Illness. When they relate to other illnesses they should be described under a separate heading—Previous Hospitalizations. The dates of admission and discharge, the final diagnoses and a concise summary of the hospital course should be given for each admission. An Interval History may be used to describe the patient's health since the last hospitalization if previous ones were in the same hospital.

Many patients may find it extremely difficult to date the onset of their illness but an answer to the question "When did you last feel perfectly well?" is frequently helpful. Other patients may be helped by relating symptoms or illnesses to prominent events—Christmas vacations, marriages, deaths, the Great Depression, outbreak of a war, etc. The decision to place data in the Present Illness or in the Past Medical History or Review of Systems is frequently variable. For ex-

ample a patient with diabetes of 15 years duration may be admitted with an upper respiratory infection of 2 days duration and the diabetes may be discussed in the Present Illness in the Past Medical History or in the Review of Systems depending upon the nature of the Chief Complaint and the presenting problem. It would be essential to indicate at the outset that the patient is diabetic.

The order of presentation of data in the Present Illness is flexible. For example in prolonged illnesses such as tuberculosis it may be necessary to organize the Present Illness chronologically by years or by months indicating the patient's progress step by step. In other instances such as progressive heart failure the Present Illness may be organized chronologically according to the development of symptoms and the relationship of underlying rheumatic fever for example may be indicated in the Present Illness or in the Review of Systems. It is always well to orient the reader by indicating when the patient observed his first deviation from health. This frequently precedes the onset of the symptoms given as the Chief Complaint.

The Present Illness should be a complete sequential and factual account of all the factors events symptoms and reactions which have characterized the onset progression exacerbation or course of the illness. For the most part no interpretation is made although the examiner should keep in mind that he is attempting to answer a number of important questions. To what disease agents, traumata stimuli, or stressors has the patient been exposed? Why did the illness develop at this particular time and not some weeks earlier or a few days later? Has the patient been exposed to any source of contagion among his family at work or as a result of travel? Obtain precise details with dates and descriptions of the illnesses. What was the emotional and social climate at the onset of the illness? What treatment has the patient taken himself or been given by other physicians? This should be described as accurately as possible in terms of dosage frequency nature of treatment duration and reaction. Why did the patient seek help at this time rather than postpone it or seek it earlier? If the patient is referred from another physician why is he being referred at this particular time? Does the Chief Complaint represent the real problem? Frequently it is only an excuse for

consulting the physician for some deeper problem. Is the presenting complaint part of an acute a chronic or a recurrent maladaptation or is it some new departure from health? What secondary complications have developed in relation to the basic difficulty? The patient may manifest marked anxiety or denial in response to a somatic disease or he may develop a somatic symptom in response to a stressful life situation. It usually is important in the Present Illness to give some evaluation of all the possible factors impinging upon the patient, whether they be physical chemical infectious climatic social or emotional.

Each change in symptoms or each chronological period in the Present Illness should be paragraphed and the outstanding symptoms underlined to provide further clarity. Time should be related to the onset of the Present Illness the month and year may be included but days of the week should not be used except to indicate events recurring on certain days of the week e.g. migraine headaches on Sundays. If recurrent symptoms have suggested seasonal incidence as in allergic diseases these should be indicated by using the names of the months or if there is a relationship to changes in the patient's pattern of living e.g. crops income tax time vacations Christmas etc it should be stated clearly.

It is important to estimate in general how sick the patient is and also to obtain some estimate of how sick the patient thinks he is. This may be determined by inquiring whether he has observed such complaints as irritability fatigue weakness frustration anxiety or depression. How much has the illness interfered with his work exercise relaxation and sleep? Has it confined him to bed? Is he too ill to go to the bathroom? The illness may circumscribe his social activities his work his domestic responsibilities his marital life or all physical activity. Particular symptoms and signs are defined by describing such features as onset duration recurrence periodicity character of sensation site radiation factors producing exacerbation or relief associated symptoms or activities and response to therapy. Pain for example is described by giving its location radiation character (sharp colicky burning dull gnawing) severity (mild moderately severe, excruciating requiring morphine causing the patient to double up or cry out) duration (constant intermittent periodic) time of occurrence



(1)	Jan	John (4) Patient	Tom (2)	Mary (8)	Mother (32)	Father (33)
	4					Sudden onset acute tonsillitis Fever subsided 1/2 day after starting 4 m penicillin
	5					
	6					
	7					
	8	Head cold with sore throat mild fever			Has been well	Has been well
	9					
	10					
	11					
	12					
	13					
	14					
	15					
	16					
	17					
	18					
	19	Onset of painless hematuria puffy eyes				
						Back to work

20  
21  
22

Admitted to hosp

(2)	DATE	AGE	EVENT	SYMPTOMS
	1934	14	Summer camp	Loss of appetite and weight
	1942	21	Shortly after honeymoon	Acute episodes of epigastric pain—relieved by food and alkalis
	1947	26	Death of mother	Depressed for 8 months Worked only intermittently
	1949	28	Started own grocery business	Recurrent epigastric pain postprandial Started on antispasmodics sedatives antacids by physician
	1950 52	29 32	Much worry about business	Frequent exacerbations of ulcer symptoms and tarry stools
	1953 Oct	33	Overexpanded business and in debt	X ray in OPD showed active duodenal crater
	1956 Mar	36	Worried about income tax and pregnancy of wife	Ulcer symptoms worse accompanied by progressive nausea and vomiting

(relation to what circumstances or events relieved increased produced by meals bodily functions position exertion rest heat cold anxiety or medication, etc.), association with additional symptoms (nausea, vomiting diarrhea chills fever cough sweating prostration) interference with work sleep meals *Frequently the patient will need assistance in clarifying such complaints as pain in the side dizziness cold stomach trouble etc.* When the patient's description of symptoms or signs is clear and graphic however his own words may be quoted and accompanied by further explanation of essential details. Lay terms and diagnoses when used in the history should be put in quotation marks. The examiner should obtain a precise accurate description of each episode of illness and should not accept the patient's statement at face value. If the patient states that he was operated on for appendicitis it is important to elicit the precise symptoms and the sequence of events at the time. Was a pathologic report obtained? Frequently it will be necessary to consult the physician in charge of the patient at that time or to write to other hospitals for further details. A telephone call may save valuable time when it is important to know details about drugs dosages or operations.

The Present Illness is usually the most important part of the medical history of a sick patient. Discrimination in both eliciting and recording of data is expected. a long history is not necessarily a good history. It is not essential to list all the normal data but it is important to list those normal features which are relevant to the current problem and to indicate that the various illnesses included in the differential diagnoses suggested by the patient's complaints and history have been thoroughly explored.

## CLINICAL GRAPHS

Frequently clinical graphs are useful for relating events and symptoms. Two examples of these are on pages 36 and 3

## APPENDIX A 3

## The Family History

This section should describe the human background into which the patient was born and which influenced his constitutional and behavioral development. It should also indicate his present close interpersonal relationships. There should be brief descriptions of the principal members of the patient's family and the patient's relationships to them discussed. The family may be regarded as a unit of interacting persons providing the framework for the patient's childhood and adult relationships. It is important to consider the effects both of the immediate family and of all the members of the household upon the patient's development and adjustment. Attention should be centered on the family (and household) as a system of human relationships with patterns of love-hate, authority, dominance, subordination, punishment, and reward. It is in the family that biologic man develops his individual personality and becomes a social person, and the physician needs great sensitivity to the human matrix in which this process has occurred. Much of the patient's behavior may need to be understood in terms of the family's values, which may be quite different from those of the physician.

In ascertaining important events in the family, such as births, illnesses, deaths, separations, etc., it is most important that the patient's age at the time of these events be recorded, and that any possible temporal relationship between them and the patient's illnesses be established. It is these life situations which frequently provide the stresses to which patients may adapt by illness.

### FAMILY BACKGROUND

A statement about mother and father and other important figures, including age, occupation, background (ethnic, extraction, religious, national, cultural, educational), outstanding personality characteristics, state of health, presence of symp-

toms like the patient's approximate dates of illnesses and death (indicate patient's age at the time) nature of terminal illness Was the patient present? Any symptoms of other illnesses? What is or was the personal relationship of the patient to the parents? Does the patient live with the parents? When did he leave home? Why?

## SIBLINGS

Number of mother's pregnancies list first name age state of health occupation marital status of each sibling and note position of patient in the family Frequently a small chart will be helpful Mention illnesses or other problems What is patient's relationship to various siblings?

## MARITAL HISTORY

### 1 Spouse

Age occupation background outstanding personality characteristics and state of health Discuss courtship Date of marriage present status of marriage Indicate any recent changes in the spouse's health occupation behavior etc Give some evaluation of the marriage in the social economic domestic and sexual spheres

### 2 Children

Ages health occupation sex marital status of children Are the children living at home? Provide data about symptoms illnesses deaths etc if any

## FAMILIAL INCIDENCE OF DISEASE

Consider allergy arthritis bleeding disorders cancer diabetes mellitus epilepsy hypertension kidney disease migraine nervous or mental disorders peptic ulcer rheumatic fever tuberculosis and other dominant patterns of illness Indicate if pertinent all members of the family who have a specific illness Mention family attitude toward illness

## APPENDIX A-4

# The Socio Environmental History

## SCHOOLING RELIGIOUS ACTIVITY MILITARY SERVICE

### 1 Schooling

At what age did schooling begin? If delayed why? Memory of first day at school Length of schooling Age at end of schooling Reasons for leaving school Did the patient like school? What were his achievements? How did he get along with teachers and other pupils? Was schooling painful for him or a satisfying experience?

### 2 Religious Activity

Denomination? What is the extent and function of church participation for the patient? Is it primarily for moral and spiritual guidance or for the social activity? Or both? Discuss the patient's and family's attitude toward religion Is the patient's conduct at variance with that of his family or social group?

### 3 Military Service

Dates of enlistment branch of service and record Health in service rank theaters of service and circumstances of discharge General attitude toward authority in all spheres of activity

## OCCUPATIONAL HISTORY

State when the patient began to work, describe types of jobs and discuss why any changes were made What is his income level? How is his work valued in terms of prestige and social satisfaction? With whom does he work and how does he relate to them? What are his attitudes toward working hours? His future plans and ambitions? How does he handle

toms like the patient's approximate dates of illnesses and death (indicate patient's age at the time) nature of terminal illness Was the patient present? Any symptoms of other illnesses? What is or was the personal relationship of the patient to the parents? Does the patient live with the parents? When did he leave home? Why?

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## MARITAL HISTORY

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Consider allergy arthritis bleeding disorders cancer diabetes mellitus epilepsy hypertension kidney disease migraine nervous or mental disorders peptic ulcer rheumatic fever tuberculosis and other dominant patterns of illness Indicate if pertinent all members of the family who have a specific illness Mention family attitude toward illness

sleeping pattern? Record any dreams and fantasies. What is the patient's understanding of his present illness? What is its bearing on his life?

## APPENDIX A 5

# The Review of Systems

This section provides detailed reviews of the symptoms in each of several regional and physiologic systems. At times the review of systems may be concerned with intensive inquiry into the functioning of a particular system and at other times it will primarily constitute a means of screening the patient for the presence of early or latent illness which may be prevented or modified. The symptoms in the following paragraphs may be considered when there is a need for detailed evaluation of particular systems.

### 1 Skin Hair and Nails

Type character location and frequency of eruptions changes in color character consistency or pigmentation pruritus bruising petechiae tumors exposure to toxic agents or contactants hives alopecia abnormalities in character quantity or distribution of hair clubbing of nails brittleness fungus infections nail biting

### 2 Head and Special Senses

A GENERAL DIZZINESS vertigo or fainting describe the patient's sensations precisely. Indicate the character and duration of any loss of consciousness or awareness. Indicate whether the symptoms are relieved quickly by lying down. By dizzy or faint does the patient mean unsteady or lightheaded? If there is a history of trauma, indicate whether there was associated loss of consciousness and its duration. What was the precise



responsibility and authority? What is his concept of success? Inquire about his exposure to contagion or toxic agents (industrial solvents insecticides cleaning fluids lead paint remover etc.) What are his economic resources and reactions to them? Any financial worries or debts? Does he have hospital insurance? What coverage does it provide?

How does the patient employ his leisure time? Has he any secondary skills and interests which he may develop in the event his primary skills are disabled by illness? What are the standards of social behavior sports games parties dances etc.? Has he any plan for retirement? Attitude toward need for social contact and esteem of others. Does he get along well with people in general?

## LIVING ARRANGEMENTS

In what sort of home environment and neighborhood does the patient live? Where does his family live? Does he own or rent? Any recent change in place of residence? What is the home's geographic relationship to his work? How large are the living quarters? How many people live in the dwelling? Has the patient a room of his own? If not, with whom does he share it. Are there stairs or other physical aspects in the home which affect the patient's health adversely? It is frequently important from social cultural and epidemiologic viewpoints to list the patient's principal places of residence and the dates he moved.

## SPECIAL FEATURES RELATED TO THIS ILLNESS

In this section consider any specific changes or problems which might be related to the illness including finances changes in home and work use of drugs or alcohol. What are the patient's relationships with other people at work and at home? Any feelings of inadequacy suspicion or concern about how others feel toward him? What are his patterns of sexual outlet? Has there been any change in this? Mention the major ways of reacting emotionally to this illness.

How does the patient react when anxious? Is there any increasing level of anxiety? Is there any change in the patient's

Is hearing better in a quiet or noisy environment? Where is hearing best—in groups (theaters churches etc.) in conversational situations (single person or groups)? Social adjustment as result of deafness? Is a previous audiogram available? Does patient wear a hearing aid? How well does it function? Any speech pathology associated with deafness or otherwise? Tinnitus (steady clicking or pulsating) pain, discharge vertigo or dizziness does mlieu spin floor rise or fall? Are there associated nausea and vomiting?

**E Nose** Discharge epistaxis obstruction mouth breathing sinusitis (pain, tenderness or drainage) hay fever frequency and duration of colds use of tobacco chronic use of nose drops or inhalers

**F MOUTH AND THROAT** Sore mouth sore tongue ulceration, leukoplakia, taste bleeding gums or other mucous membrane lesions dental caries dentures, extractions abscesses pain general condition pain sore throats tonsillitis tonsillectomy (when and for what reason) difficulty in swallowing change in voice hoarseness postnasal discharge or bleeding pain in the ears with swallowing cervical adenitis

### 3 Respiratory

Cough (duration precipitating factors time of day) dyspnea cyanosis stridor aspiration of food or foreign bodies croup bronchitis asthma pneumonia (if recurrent has it always been on the same side?) tuberculosis exposure or family history of tuberculosis hemoptysis indicate amount, whether blood streaked sputum or gross blood and whether bright or dark. inquire about unusual chest pain or associated sensation and indicate location sputum estimate amount in tablespoons cups indicate whether thick, tenacious or watery and color odor exposure to irritating dust, vapors or other noxious agents (e.g. silos caves manure pigeons bats chickens, etc.) use of tobacco (how much for how long) night sweats chest pain (duration location relation to exertion, meals, respiration cough position emotion etc.) wheeze (duration relation to season, possible allergens climate etc. Is

*location of the injury?* Were skull x rays taken? Was there drainage of cerebrospinal fluid or blood from the nose or ear? Are there other abnormalities of the scalp or cranium?

**B HEADACHE** May be described under this heading or under the Neurologic section (I) A detailed description of the headache should be given under the following headings

- 1) *Location*—localized generalized fronto occipital unilateral facial temporomandibular temporal orbital maxillary root of nose vertical (sphenoid) occipital or nuchal
- 2) *Character*—steady pulsating lancinating deep or within cutaneous tissues bandlike pressing etc paresthesias
- 3) *Time of onset*—relationship to fatigue emotion tension or pressure hypoglycemia use of eyes smoking alcohol or caffeine time of day day of week time of month relationship to menses seasonal regular or irregular
- 4) *Relationship to position of head* (cervical arthritis) occupational postures stooping or jarring of head diminished nasal breathing space or sinusitis Improved or aggravated by digital pressure over area
- 5) *Association with scotomata diplopia imbalance vertigo nausea vomiting lacrimation change in mood*
- 6) *Family history of headaches*—which member of the family? What were the symptoms? Are the patient's headaches like these?

**C EYES** Visual acuity corrective lenses photophobia drowsiness double vision difficulties with night vision asthenopia blurring distortion pain scotomata strabismus trauma inflammation discharge itching working conditions especially illumination

**D EARS** Hearing is deafness associated with acoustic trauma (gun fire machinery etc) aural infections in the past (meningitis syphilis mumps influenza) pregnancy toxic agents streptomycin salicylates quinine? Is there associated staggering vertigo difficulty walking in dark diplopia? Duration of hearing difficulty

Is hearing better in a quiet or noisy environment? Where is hearing best—in groups (theaters churches etc.) in conversational situations (single person or groups)? Social adjustment as result of deafness? Is a previous audiogram available? Does patient wear a hearing aid? How well does it function? Any speech pathology associated with deafness or otherwise? Tinnitus (steady clicking or pulsating) pain discharge vertigo or dizziness does milieu spin floor rise or fall? Are there associated nausea and vomiting?

**E NOSE** Discharge epistaxis obstruction mouth breathing sinusitis (pain tenderness or drainage) hay fever frequency and duration of colds use of tobacco chronic use of nose drops or inhalers

**F MOUTH AND THROAT** Sore mouth sore tongue ulceration leukoplakia taste bleeding gums or other mucous membrane lesions dental caries dentures extractions abscesses pain general condition pain sore throats tonsillitis tonsillectomy (when and for what reason) difficulty in swallowing change in voice hoarseness postnasal discharge or bleeding pain in the ears with swallowing cervical adenitis

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it audible? Does it change with coughing? Does it respond to medication?), dates and results of all chest x rays

#### 4 Circulatory

Fatigue dyspnea relation to exertion position emotion irritants etc duration relation to inspiratory or expiratory phase of respiration paroxysmal nocturnal dyspnea orthopnea air hunger cyanosis (relation to exertion) plethora angina or other chest pain (relation to exertion position emotion etc) palpitation (regular irregular onset and cessation) edema growing pains joint pains history of heart murmur date first observed hypertension date and level of hypertension note previous insurance industrial or military exams results of all chest x rays Varicose veins thrombo embolic disease (phlebitis milk leg emboli) leg ulcers night pains restless legs inter mittent claudication gangrene

#### 5 Gastrointestinal

Recent change in appetite wt weight relation to food in take hours and habits of eating food intolerance nausea vomiting (color blood volume frequency) heartburn belching bloating air swallowing difficulty ( catching ) or pain on swallowing dysphagia epigastric abdominal or back pain tenderness (radiation and referral) nocturnal pain jaundice diarrhea hemorrhoids constipation (use of laxatives) mucus or blood in stools tarry bulky or clay colored stools changes in character caliber frequency and timing of stools

#### 6 Urinary

Frequency of urination (day and night) dysuria strang ury urgency nocturia polyuria oliguria pain (location and character) pyuria smoky urine hematuria size and force of stream (observe if possible) retention hesitancy dribbling incontinence enuresis edema of face renal colic passage of calculi previous cystoscopies irrigations etc

## 7 Reproductive

- A MENARCHE AND MENSES** Age of onset interval between periods duration of flow amount and intensity of flow (this may be indicated as follows 13/28/5 6/heavy first day) pain dysmenorrhea (location and relation to menses) intermenstrual pain or bleeding record onset dates of last menstrual period (LMP) and of previous menstrual period (PMP) preparation for first menses attitude and response to first period nausea and vomiting at first or subsequent periods Are the nausea and vomiting associated with the onset of flow or with pain? Changes in normal habits with menses? Leukorrhea pruritus postcoital bleeding dyspareunia loss of libido frigidity (absolute or relative)
- B PREGNANCY AND FERTILITY** Number of years married age at first pregnancy total number of pregnancies (indicate whether term premature or abortions and note the trimester) number of living children (ages of oldest and youngest) general state of health and attitudes during pregnancies nausea vomiting bleeding headache visual difficulties ankle edema, hypertension, albuminuria convulsions or other complications duration of labor difficulties duration of convalescence attitude toward future pregnancies type of contraceptive used and attitude toward it If there is a history of absolute or of relative sterility ask about the attitude of both partners toward it Have they both been studied medically? Questions about menstruation and pregnancy often yield important information about the patient's psychosexual development For purposes of brevity the menstrual and reproductive histories may be arranged according to the outlines used by some departments of Obstetrics and Gynecology
- C BREASTS** Masses swelling tenderness discharge or pain (note relation to menses pregnancies and nursing) Were children nursed?
- D VENEREAL DISEASE** Urethral or vaginal discharge genital or mucous membrane lesions (plaques warts chancres and buboes) rashes alopecia inquire about history of syphilis or gonorrhea by name symptoms

or colloquialisms previous serologic tests for syphilis (where when results), lumbar puncture (where when results) antivenereal treatment inquire about intravenous or intramuscular injections and their duration any course of penicillin whether for venereal disease or some other condition should be noted exposure and name of contact if possible

## 8 Musculoskeletal

Postural deformities congenital anomalies paralysis or weakness old fractures muscle atrophy or weakness girdle shooting or muscle pains backache or neck ache pain on walking painful spots on fingers or toes calluses fungus infections of extremities temperature of hands and feet sweating pain stiffness limitation swelling or redness of joints

## 9 Neurologic

Headache may be described under this section or under Head and Special Senses (B) dizziness syncope seizures (precise description from an observer) loss of sense of smell or taste difficulty in swallowing aphasia speech disturbance stiff neck paralysis facial weakness or other muscle weakness stiffness involuntary movements tremor wasting numbness tingling pain loss of sensation difficulty in walking ataxia loss of bladder or bowel control handedness

## 10 Hemopoietic

Anemia hematinics (liver iron folic acid B<sub>12</sub> cobalt etc.) history of transfusions and reactions evidence of blood loss blood group abnormal bleeding or bruising lymphadenopathy splenomegaly exposure to lead benzene paint remover irradiation or drugs toxic to the hemopoietic system

## 11 Metabolic and Endocrine

A NUTRITION AND WEIGHT FLUCTUATIONS Number and character of meals per day review and record com

plete dietary history if indicated (Appendix II 1 p 58) special diets (reduction diabetic bland low sodium etc) inquire about between meal eating consumption of soft drinks alcohol etc food fads and habits Are dietary problems related to emotional cultural social or economic factors? Weight fluctuations and weight distribution record average stable weight and present weight

**B ENDOCRINE** Consider hyper and hypofunction of the various glands

- 1) *Anterior pituitary*—abnormalities of growth or generalized endocrine disease
- 2) *Posterior pituitary*—polydipsia insatiable thirst polyuria (obtain accurate measurements) dehydration
- 3) *Thyroid*—temperature intolerance perspiration skin hair voice or face changes change in appetite muscular weakness anxiety lethargy history of goiter thyroid or antithyroid medication thyroid surgery thyroid pain tenderness or cysts
- 4) *Parathyroid*—increased neuromuscular excitability (cramps tetany paresthesias) ectodermal changes hypotonia weakness bone pain renal colic
- 5) *Gonads*—menstrual irregularities breast changes alterations in libido or fertility changes in secondary sexual characteristics masculinization or feminization
- 6) *Adrenal hypofunction*—asthenia easy fatigability (particularly late in the day) weight loss increased pigmentation increased salt intake paroxysmal nausea vomiting and prostration
- 7) *Adrenal hyperfunction*—adiposity of the face neck and trunk with sparing of extremities postural changes (dorsal kyphosis) plethora easy bruising purple striae hirsutism masculinization pseudo precocity

**C DIABETES MELLITUS** Polydipsia polyuria appetite weight loss peripheral neuritis coma cataracts pruritus history of glycosuria hyperglycemia record diet and type of insulin taken (indicate precise dosage time



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**C DIABETES MELLITUS** Polydipsia polyuria appetite weight loss peripheral neuritis coma cataracts pruritus history of glycosuria hyperglycemia record diet and type of insulin taken (indicate precise dosage time

of day taken and inquire about weakness palpitation sweating prostration or other reactions)

## 12 Psychologic

Childhood behavioral problems enuresis anxiety emotional lability nervousness nervous breakdowns depression blue spells lethargy fatigue (early or late in the day) phobias impairment of memory insomnia (difficulty in getting to sleep difficulty in sleeping or early awakening) sleep-walking tics nail biting delinquent antisocial or unusual behavior

## 13 Psychosexual Adjustment and Maturity

Much of the data in this section ordinarily will be obtained during the discussions of the reproductive function and the patient's marriage. Discretion should be used in discussing (and recording) this material and if it proves disturbing to the patient much of it should be deferred until a later interview. Attitudes and reactions during discussion of this area should be observed and recorded; they frequently are more revealing than what the patient actually says. The following topics are among those which may be considered: Early sexual instructions curiosity and experiences attitudes of parents toward sex nudity modesty etc. Masturbation worry about it? Age of onset of dating. Early attitudes toward the opposite sex. Pre-marital sexual experiences courtship duration difficulties encountered. Illegitimate pregnancies. Criminal abortions? Is the patient happily married? Difficulties with spouse? Is sexual adjustment satisfactory to both partners? Duration and character of foreplay and capacity of partners to achieve orgasm. Any increase or decrease in sexual desire during the present illness? Worry about it? Are symptoms connected with sexual activity? Are they worse after intercourse? Is the frequency of intercourse satisfactory? If not already discussed consider frigidity impotence and premature ejaculation. Extramarital relationships? Any homosexual experience? Any perversions?

## APPENDIX B

# The Physical Examination

Certain features of the physical examination deserving special emphasis are discussed in this section. Neither this nor the basic outline is an attempt to be complete. For details a text book on physical diagnosis should be consulted.

### CONDUCT OF THE EXAMINATION

The physician-patient relationship will be influenced greatly by the competence, thoroughness, courtesy, and gentleness with which the examination is conducted. To most patients a physical examination is a more or less uncomfortable experience. Some patients are apprehensive because they fear the probable findings. Others are apprehensive because of lack of familiarity with the procedure. To seriously ill patients the examination may be physically exhausting, and judgment and care must be used in deciding its extent.

The physician's demeanor and attitude should give no indication of his findings, and discussion of these should be reserved until the examination has been completed and the patient has had a chance to recover his composure. Technical discussions with colleagues in the patient's presence should be avoided if possible, and if unavoidable the patient should be included in the discussion and given suitable explanations rather than ignored. Whenever unusual attention to a particular part of the examination is necessary, special care should be taken to keep the patient's heightened anxiety to a minimum.

Particular care and gentleness should be used in eliciting tenderness and in examining painful areas. Uncomfortable parts of the examination, particularly in dealing with children or in the presence of anxious relatives or friends, are best left

to the end. As a rule explanation in advance of the necessity for painful examinations and techniques is advisable.

All pelvic examinations should be chaperoned. Other examinations of women should be chaperoned when possible since some patients, particularly those with hysterical tendencies, are prone to see erotic implications in them. When help is not available the door should be left open with a suitable screen in front of it. This is primarily for the protection of the physician and incidentally for the comfort of the patient. Pelvic examinations should be performed on children and adolescent girls only when absolutely necessary to establish a diagnosis.

## OBSERVATION AND RECORDING OF APPEARANCE AND BEHAVIOR

The paragraph on appearance and behavior is the usual place in which the patient is described as a complete entity and identified as an individual. It should convey a word picture which 20 years from the date of writing will create an impression of the patient that is accurate and comprehensive. In addition to his physical appearance the behavior of the patient during the interview and examination, the way in which he tells his story and the relationship he forms with the physician as well as the physician's feelings toward the patient should be observed and appropriately described. It is a thumbnail sketch of the general physical and behavioral characteristics of the patient as a person. The following areas should be considered:

### 1 Mental State

State of consciousness, orientation, mood, attitude, attention and memory.

### 2 Language

Quality of speech, content and coherence.

### 3 Posture

Position in bed, gait, dress and appearance.

#### 4 Physique

Constitution race sex (use the terms man and woman not male and female) biologic compared to chronological age state of hydration and nutrition muscular development obvious physical abnormalities

#### 5 Severity and Duration of Illness

Discomfort complaints color (cyanosis pallor jaundice etc) respiratory difficulties (orthopnea hyperventilation dyspnea air hunger sighing etc) cough sputum voice blushing or blanching (degree and circumstances) restlessness passing of flatus

#### 6 Attitude and Emotional State

Mentation intelligence (estimate level) cooperation (both overt and covert) attitude toward examiner mood degree of aggressivity or passivity dependency exhibitionism modesty sudden changes in behavior in relation to special topics or parts of the examination

### THE FOLLOWING EXAMPLES ARE ILLUSTRATIVE

- 1 The patient is a well developed muscular fairly well nourished white man of asthenic habitus appearing about 45. He seems severely and acutely ill with flushed face and profuse perspiration. He is writhing as he complains in short grunting sentences of severe chest pain. There is a harsh cough productive of prune juice sputum. He is oriented appears of average intelligence but has difficulty attending. There is good hydration of the tissues.
- 2 The patient is a well developed tall emaciated woman who appears older than her stated age of 20. Her face is thin and pinched without make up and the bony structure is prominent. Her hair is worn in a tight braid. She walks with a slow languid gait. Her clothes are neat but severe. She wears a fixed distant resigned smile and a martyred expression. She is motionless throughout the examination except when her mother is discussed at which time she picks at her dress. She seems intelligent well-oriented and



without memory impairment During the physical examination she was completely passive and evidenced only minimal modesty The examiner felt he was able to communicate only at a superficial level Initially he felt a need to help and protect the patient later there was some irritation with the lack of positive response by the patient

- 3 The patient is a disheveled husky youth of 18 with a faint odor of alcohol on his breath (blood sample drawn) He is perspiring profusely and the skin is cool clammy and pale There is a thready pulse and rapid shallow respiration A bone protrudes through a laceration on the left thigh The patient is alert and feels certain he did not lose consciousness

## APPENDIX C

# Summary, Diagnoses, and Management Plans

### SUMMARY OF POSITIVE FINDINGS AND FORMULATION

This should consist of 1 or more brief paragraphs in which significant positive findings are discussed. These will be based on the interview, physical examination and preliminary laboratory studies. They are obviously subject to amplification, modification and change as a result of further observation and special examinations. It is important, however, to come to a definite formulation and tentative diagnoses at the end of the initial work up. To do so increases the diagnostic skill of the physician, makes for more intelligent use of further diagnostic procedures and generally means that the initial management of the patient is more successful than without such summarization. The basic problems may be discussed under the following headings:

#### 1 Physiologic and Anatomic Considerations

The significant positive findings which suggest a disturbance at one of these levels should be summarized and their relation to various disease entities, syndromes or pathologic processes indicated.

#### 2 Psychologic and Characterologic Formulation

The positive findings suggesting psychologic disturbances should be summarized. This should be done in greater detail if there is reason to believe that the major decompensation is at the psychologic level. With all patients, however, it is important to have some consideration of their degree

## 56 SUMMARY DIAGNOSES, AND MANAGEMENT PLANS

of maturity and the major character traits and ego defense mechanisms. This section may be developed under the following headings:

- A **GENETIC FORMULATION** The developmental factors which led to the present character structure may be discussed here. In the case of psychologic illness it usually will be possible to understand the present difficulties in the light of problems in early development.
- B **DYNAMIC FORMULATION** This is a discussion of the problems and conflicts operating in the patient's life and a consideration of the situation which has made previous defenses inadequate.
- C **TRANSFERENCE** Describe the manner in which the patient relates to the physician. Indicate what previously learned emotional attitudes the patient is using and the person or persons in the patient's background the physician now represents.

### 3 Social and Environmental Formulation

This section should summarize briefly the familial and social milieu as well as the physical or climatic environment from which the patient comes and to which he must return after treatment.

### 4 Accessory Factors Likely to Promote or Interfere with Recovery

Indicate any accessory physiologic constitutional pharmacologic psychologic familial, economic social and other factors which may influence the course of the patient's illness and modify his prognosis.

## WORKING DIAGNOSES

List the most important *primary* differential diagnoses relevant to the *present admission* in the order of likelihood and preferably separately give the diagnoses of possible secondary importance.

## PLAN OF INVESTIGATION AND TREATMENT

- 1 A plan for the further evaluation of the patient's problems and for establishing the diagnoses should be outlined in detail. List the investigative procedures in the order of decreasing relative importance for this patient. Attempt briefly to give the reason or justification for any procedures which would not be considered routine.
- 2 A plan for the *initial management* of the patient should be outlined. This should include such things as the behavioral attitude on the part of the staff as well as the degree of activity, the type of initial medication, and other therapeutic measures.

## 56 SUMMARY, DIAGNOSES, AND MANAGEMENT PLANS

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## WORKING DIAGNOSES

List the most important *primary* differential diagnoses relevant to the *present admission* in the order of likelihood and preferably separately give the diagnoses of possible secondary importance.

## 1 Who Prepares the Patient's Food?

Does he eat at home in a boarding house or in a restaurant? Often the wife or mother who prepares the food for the patient is the best source of dietary information

## 2 Economic and Social Factors

Can the patient afford an adequate diet? Can he afford it part of the time? Can he purchase foods needed for a special diet? Are home grown foods available? Does the home afford refrigeration stove and other equipment for the preparation of food? Does the patient know what kind of food to purchase?

## 3 The Patient's Health

Is the patient's choice of foods modified by such physical factors as inability to masticate due to faulty teeth abdominal distress after eating nausea or vomiting? Has the patient been following a restricted diet for health reasons? If so this should be specified in detail Has it helped him? Is the patient an alcoholic? Does another member of the family have a special diet?

## 4 Psychologic Factors

Food and affection are closely associated in the experience of the nursing infant and frequently are symbolically equated throughout people's lives Whenever severe prejudices peculiar appetites or inadequate or excessive food intake are encountered emotional influences should be considered What were the parental attitudes toward food and eating? What foods does he never eat and why? Does the patient eat non food items such as laundry starch clay block milk of magnesia etc?

## 5 Religious and Cultural Dietary Restrictions

When these are found to influence the dietary habits of the patient adversely they should be discussed in detail

## APPENDIX D

# Specialized Areas of History-Taking and Examination

## APPENDIX D 1

### Nutritional History Taking

#### INTRODUCTION

A complete nutritional history frequently contributes important information about the patient's health problems. There are 2 important goals:

- 1 To evaluate the adequacy of the diet and to discover whether malnutrition is contributing to the patient's illness
- 2 To discover influences which determine the food intake of the patient such as those arising from social, economic, psychologic, racial, religious, and other factors

The following outline suggests a useful approach to dietary problems and should assist the physician in obtaining a nutritional history. It should be emphasized, however, that the approach must be modified for the individual patient in order to arrive at a satisfactory diagnosis and to establish successful treatment.

#### GENERAL FACTORS INFLUENCING DIET AND NUTRITION

Information of importance for the nutritional history will have been included in certain sections of the medical history, especially in those parts dealing with the gastro-intestinal, metabolic, and endocrine functions, but certain other areas should be discussed.

K BUTTER OR MARGARINE

L OTHER FATS This grouping may include bacon grease drippings lard fat back salt pork (used as seasoning for vegetables) salad dressing etc

M BEVERAGES These include tea coffee soft drinks alcoholic beverages artificially fruit flavored drinks such as Kool Ade etc

N SUGAR SWEETS DESSERTS

## SUMMARY

The important findings about the diet and the general factors influencing it should be summarized and the relation of the nutritional history to the patient's disease should be indicated

## APPENDIX D 2

# Developmental Appraisal of Infants and Young Children

## INTRODUCTION

The maturational development of the child follows an orderly predictable pattern within which there is as in all biologic measurements great variability The performance of the individual child may vary from the average to an extent which is not necessarily related to his intelligence as ultimately measured by standard psychologic tests designed for older persons Likewise his performance in one test area may be relatively advanced or retarded in relation to another Published observations of normal development while recognizing these variations have nonetheless emphasized the average rather than the range of performance The resulting mass of norms of performance in many areas at many specific ages obscures however unintentionally the dynamic continuity of development



## DIETARY INTAKE

The customary dietary intake may be obtained by first considering the usual meal pattern and then asking specific questions about the intake of individual foods

## 1 Customary Meal Pattern

A simple form can be used for recording the customary meal pattern the place where food is consumed and the time may be noted under each heading

BREAKFAST NOON EVENING MEAL BETWEEN MEALS

## 2 Food List

The patient is questioned about the usual intake of individual foods i.e. the number of servings per day or per week. In the event that some food is consumed in very small (or very large) quantities a note may be made of the reason e.g. too expensive causes indigestion just don't like it etc.

A MILK AND MILK PRODUCTS These may include sweet milk, buttermilk clabbered milk dry skim milk cheeses ice creams

B EGGS

C LEAN MEAT FISH POULTRY

D DRIED BEANS AND PEAS

E DARK GREEN LEAFY AND YELLOW VEGETABLES This grouping includes greens such as collards turnip salad beet greens etc broccoli green peppers carrots winter squash sweet potatoes pumpkins and tomatoes

F OTHER VEGETABLES (specify) Which vegetables in E and F are eaten raw?

G MELONS CITRUS FRUITS (oranges or grapefruit and their juices)

H OTHER FRUITS (specify)

I BREADS This may be store bread or homemade bread such as biscuits cornbread etc

J OTHER CEREAL FOODS In addition to breakfast cereals this grouping includes rice noodles spaghetti and other flour products

- 3 *Bowl*—unbreakable mixing bowl 6 to 9 in in diameter
  - 4 *Bottle*—wide mouthed transparent unbreakable bottle of 3 to 4 oz capacity (e.g. 4 oz Evenflo nurser)
  - 5 *Picture Book*—a small hard covered children's book with paper pages containing pictures of familiar objects and animals
  - 6 *Common Objects*—readily available objects such as key pencil comb pocketbook coin shoe knife ball book, bell
  - 7 *Ball*—soft rubber ball not over 2½ in in diameter
- Most of the test objects may be kept together in the bowl as a readily available kit

### GLOSSARY OF CERTAIN TERMS

- 1 *Measuring Tape* suspended over baby—The partially uncoiled tape is used as a dangling object
- 2 *Pull to Sitting*—The supine infant is pulled by his hands to a sitting position while the examiner notes to what extent the infant supports his head. The examiner must frequently keep his own head low and toward the infant's feet lest backward flexion of the infant's neck permitting him to continue to regard the examiner standing over him be interpreted as head lag
- 3 *Prone Suspension*—The infant is supported prone over the table by the examiner's hand under his chest and abdomen
- 4 *Individual Blocks*—Three blocks are offered to the infant, 1 at a time
- 5 *Massed Blocks*—The whole group of blocks is offered at once
- 6 *Imitate Copy*—While the child is watching the examiner draws a figure for him to imitate forms to be copied are drawn by the examiner in such a way that the child cannot observe how they are done

Familiarity with this voluminous material requires an effort in rote memory which dismays all but the expert

In the tabulations at the end of this appendix prepared from published observations of normal development chiefly those of Gesell and his colleagues the attempt is made to simplify the developmental appraisal by dividing the span from birth to 5 years into 8 arbitrary age periods of increasing length. The salient features of normal development in each period are stated in a few words at the head of the corresponding table. For the most part each outline calls for observation of posture, activity, and manipulation of test objects without attempting to define performance in psychologic terms. Each table summarizes the maturation of average performance of normal infants and children during the stated age period. Landmarks of performance characteristic of intermediate ages within a period are with few exceptions not indicated. The necessary observations and tests are simple; they are presented according to a plan designed for incorporation into the physical examination. It must be continually borne in mind that the tables describe *average* progression of normal performance and that considerable deviation may be normal.

Through the use of this material the physician can formulate an impression as to whether or not an infant or child is performing appropriately for his age period. The diagnosis of developmental retardation should always be made with great caution, ordinarily either after documentation of continued poor progress in the course of repeated examinations over a period of time, or by the expert in developmental appraisal. Adverse circumstances such as unfavorable emotional environment or crippling physical illness may inhibit performance of which the child is genetically capable.

## TEST OBJECTS

The required test objects, most of which are already present in the waiting or examining rooms of physicians who treat children, are listed for each age period. A few objects require the following further specification:

- 1 *Pill*—large, bright-colored pill, such as a vitamin sample.
- 2 *Blocks*—plain or figured cubic wooden blocks, not larger than  $1\frac{1}{4}$  in. on an edge.

- 3 *Bowl*—unbreakable mixing bowl 6 to 9 in in diameter
  - 4 *Bottle*—wide mouthed transparent unbreakable bottle of 3 to 4 oz capacity (e.g. 4 oz Evenflo nurser)
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# PULL TERM BIRTH TO 2 MONTHS

## Asymmetry of Posture Emergence of Social Awareness

Measuring tape mm t those pe  
Flashlight  
Tongue depressor  
Bottle

SUPINE	S c l r s s e s s B n f g t re→Impass e ga d→Al t m l sw e as of e m r	F ll ws p reon w th yes
P t	d i d B dy Asymmetr w th t e n k r f x Mfo p expo se R lla partly c de→L es flat o ba k H d Turn d t s d m v th ough 90 H d F l d Tus e t u k Scrawny→Fum	
M u	g tepe o stethosc p u pe d d o b by B l p e t p t n d rect l of w on→D l y d p e c p t on just out de l e of F ll ws w th y 30 m re t m d l e→Follows 90 past m d e Flashght D es n t foll w t w th y a T tu depress pl ced h d Fut l s lughly t l n t (dors t or pt c)→Rec i es e r ad ly D p a t t o c→R t b r lly B ll p g m e w a es l w n by cha g f c t ly d f c l reap n o s	
ILL TO SITTING	ILL TO SITTING g→Mod rat l g	
SUPPORTED SITTING	P t m k R und d He d Drooping m m t rly rns d→Unste dily e ect	
SUPPORTED STANDING	P t e L ga b n fly t d d toe fl x d	
PRONE SUSPENSION	P t D oop g→E t ded w th k ad a d l x t em t m l n w th body	
PRONE	P t d i d B dy Th d n R d C w l g m m us of low e t m t s He d Tu t e d l f s t b ly ff t b t p→l f n t d s 3	

# 2 TO 4 MONTHS

## Development of Bilateral Symmetry Beginnings of Eye Hand Coordination

M a g tap t d sc p  
T a h l g h t  
T g d pre r  
R l  
Full

### SUPINE

S d p M t re → Acti e play, th m x th t t b, ts  
f t d t by  
B dy A ymm t cal, w t t k n → P d m tly ymm t l t bly t ty f rna  
H d T d t d → H l d p d m tly m d p t  
H d P d m tly f t d → Pred m tly p g pl k rat h  
I t f th m → S d pl y th th m  
M a g t p t th p u p d d b by f is  
S l by f l w 90 th y → R d ly f l u → 180  
D l y d f t f g a → U t u t → H t o m m m d l e b m l c t c t  
H a h l g h t D t f l t w th y t → F flows it  
7 g d d p p l c d b d  
R t a t f f a s g l y p l g d p o d s → P t s t m u th  
B H A l r t f cal p t t b n f y → R g r d t m m d t l y d t d y → App l t w th f h d

### PULL TO

#### SITTING

H d M d t l g → S l g h t l g

#### SUPPORTED SITTING

P t B k U formly u d d → Upp b k tra ght  
H d U te dy → St dy h l d f d

#### SUPPORTED STANDING

P t Sustai d t mty g fra tu f w g t t by  
E t d s l g s ca tly f t → R s t o t m y l f t f t

### PRONE

P t B dy R a s h u l d r e → S p p ts l l l b w d f rna → M y l l t up e (hust r y o ob rva t u )  
H d R ca t e c c u r r e n t l y 2 3 → h o l d s t t a d l y p r p d u l t t b l t p

B n t th p (large b j t) I d f t w → A l t t t d a c t i v a t  
Full ( m n b y t) U re → D l y d reg l b f w s

### Test objects

# 4 to 6 MONTHS

## Good Head Posture Emergence of Independent Use of Each Hand

M asu ng tape m stethoscop  
To sue d pre s r  
Bell  
Block  
I U

### SUPINE

S ad e p su s B ware f st ng m (hst ry or ob errat n) usu ly djunct m d ly  
I l d i ty  
M us b l i ral ymm try→R a d e t nd l w xt m u s→Pl y w th f t  
I ont t b b→D l k s h g n ba k→R ll to pro e (hst ry or ob errat n)

### Test objects

M us e tape o t thoscope u pe d d o r b by  
M t an bun n l t t→Tw o-h nd re h→O e hand h  
T g d p s l k→G asp t ct→Gra ps on se g→Transf rs t oth r ha d  
B ll M n l en n m t d wa rs f sou d→Turns h d to prop r a do

### PULL TO

H d Slight l g→N l g

Ass ts x m r→R u s h ad po tan only

### SITTING

### SUPPORTED

### SITTING

P l B k K p upp b k tra ct→B l ll th uppo t→Supports self briefly on ha da  
H ad St dy h ld t rw d→ll ld t ct

### Test objects

Ball Sh w renes f so d→R ct l r a d h lds b d l→B ngs t o tabl  
I d d d M k  
Looks at f→ll lds f l lds t c nd→Grap l h ld 2 br fly not p th d  
Pecan us gra p t t→P lm r (4 f g r) gra p→R d l p lm r (3-fing ) g a p  
Maw d bl ls Look →G a p l a coata t→G a p d h lds l e asp f o t rai oth m  
D pp d ob, l (b b) h k) f n re of lons→Full vs obj ct w th eye→R cu s t

### SUPPORTED

### STANDING

P d d i ty S ppo ts n ll l ct u l w ght→S pp rts most f w ght bouncers

### PRONE

### Test object

P l R t B w→O flow a d l h d→R th ha ds nd abd me →Fox bly ha ds and kn rs  
P H l c thy sw re f t→R k t ward st w th w b le h d m y t u h x

# 6 to 9 MONTHS

## Emergence of Index Finger Poking and Pincer Grasp

### Sits and Creeps

BH  
BH  
BH  
BH  
BH

HISTORY AND OBSERVATION	S	I	P	C	t	d	w	f	t	g	rs	freq	thy	m	f	c	d	g	tt	pt	d	d									
	S	H	E	N	d	pp	t-S	u	w	ll	-Ct	B	f	m	tt	g	t	p	p	ut											
	U	pp	i	d	i	d	E	N	d	tru	k	pp	t	d	-N	d	hy	t	h	h	d	h	ld	-p	th	if	to	t	d	g	
	P	T	t	p	t	bd	->	F	t	->	C	ps																			
TESTS WHILE SITTING (Mother's lap)	BH	B	BS	t	i	bl	->	W	t																						
	I	d	d	i	M	k																									
	R	d	al	p	bm	(S	h	g	)	gr	p	->	R	d	i	d	g	tal	(	f	i	g	r	)	gr	a	p				
	Gr	a	p	i	h	ld	2	)	h	a	t	th	d	->																	
	Gr	a	p	h	3	->																									
	C	mb																													
	H	ld	2	d	i	i	t	tl	d																						
	W	d	ll	k	p	h	a	up	2	3	->	R	1	v	h	a	t	3	p	->	E	pl	u	s	l						
	BH	h	s	d	b	i	H	ld	blocks	look	t	h	w	->	T	h	block	t	b	3	->	F	g	rs	bl	k	pl	ed	bow	l	
	BH	k	d	pull	(i	g	d	h	b	j	t	)																			
	p	d	m	t	t	re	t	bl	k	->	p	d																			
	P	H	Wh	l	h	d	k	g	->																						
	R	ad	i	rak	g	->																									
	I	d	f	i	g	h	->																								
	S	u	re	g	asp	(th	m	h	d	d	f	d	v	h	g	)	w	th	rv	d	l	r	f	i	g	rs	->				
	S	u	re	g	r	p	w	th	t	d	d	f	i	g	rs	->															
	P	r	g	a	p	(tl	m	b	d	t	p	f	d	r	m	ddl	f	g	)	w	th	h	a	d	t	g	t	l			



# 9 TO 15 MONTHS

## Increasingly Deft Release of Objects Walks

HISTORY AND  
OBSERVATION

TESTS WHILE

SITTING

(Mother's lap)

5 ad p Ind at w nts by g tu a d w rds 1 as g te e t s p epl  
S it g S' to w th ut turn g→p to (ill m nths)

1 d d l l l Ls Grasp all push s d w th n th →  
R leaves 1 whid h lch g a th r→  
Att mpts t w r w th ut s o c e →

1 d d b l e k s Pl ya with 3 r m e→  
g c 2 mult u ly 1 with h b d→  
Pl 1 w th ral q t lly (ill m th) →  
P 2 n l b d

2l Ls a d b w Touches b l ch in bowl w th h nd→  
R moves block→

Pats 1 s w thout rel a. g→  
R 1 as s l o d m tral n→  
R 1 as 1 spont e ly→

Pull P r grasp w th h nd ut g t ble→P e gra p om b (ill m tha)  
P l l a d b l l Sh wa s crea g p f re fo p l l (mall b j ct) o r h tcl (l g obj ct)→

Po ts at p l l bottl →  
Tries r releas p l l i bottle→  
R leaves su e ad lly whe h wn→  
R 1 as p t u ly o min d  
Boll bl L sh / y Off re t xam r w th ut r l as g→  
R 1 as mna d→

P d d p p { ft r l y } Off re h wa t p nt ously→  
P l l b k { ft r l y } Att mpts t throw a pl y or p r v r locw  
C nsm b j ts (aft l y c ) I d cat recogn n ad f or m m rt cal t k

# 15 to 24 MONTHS

## Execution of Complex Orders Grade Imitation with Pencil and Paper

HISTORY AND OBSERVATION	M k		P cl a d p p	
	B w	P ll	C mmo ob;	St m y
Tests While SITTING				
S. l p n B e l t f t g				
Squats p l y D m t m m r y P ll th al coop t we pl y				
U l a d Comb m s m w d s t t				
El k B lds t l 2 whe h → B ld t w f 6 or 7 wh ah wa q t d				
M h d b ul p to 5 6 blocks to bowl d m o th m →				
I all d b tll				
P l d p p l m t i ac bbl →				
P t b k				
C m n b j l R g s a al → N mes 2				
Del! An mps to th w pl y → Thrown o mm d → K h s whe shown → A chs on mps d				
St i Cre p p →				
W lks p w th h d h ld →				
W lks p h ld g b t d w w th h d l ld →				
W lks up d d w l (m y h ld ba se ) both f t t e h tre d				
I b l m p h ( g b ll oth b j ct)				
C n t 2 mpl d r e i → C n o t 4 comma de				



# 3 TO 5 YEARS

## Increasing Competence in Drawing Achievement of Good Balance on One Foot

HISTORY AND OBSERVATION	3 Yr		3 1/2 Yr		4 Yr		5 Yr	
	P	all l pl y	C	p rat pl y	(assoc t )	U s dis rs t t p tures	St	ts p cal d p p r
Tests								
Bridge of 3 blocks	B	lds wh sh	B	ld l m mod l				
Drawing of geometric forms	Im l l c w C p		C p	=		Im l l sq	C p as squa C t draw t d mo d (w ll b bl) 6 y rs	
Spontaneous drawing of man						Crud h d a d ppendag s	Heads torso rm l gr	
Use of words	R p	t 3 d st				R p	is 4 d g ts	N m 4 l m
Stairs	W lk up l t g f t					Walks d w b th f t t h t d	W lks d w m l t t g f et	
Additional tests of coordination and balance	B l l f t	m m t ly				Sk p l f t	St ps o both f t B f s n l foot d	

## 2 to 3 years

### Descriptive Use of Language Achievement of Good Coordination and Balance

## History and

## OBSERVATION

Play Date only

Put on her U butto & cloth :

[illegible]

### Tests While Sitting

B ld ton f 6 + Y → B ld tow f 9 o 10  
 Bwldn tra f 2 m → Add ch m y → B ld b dg of 3 wh a sh wn  
 d d poy  
 l lds p c l by fi → If lds t by fi gwa (30 m id )  
 f m f i t i l n d circle →  
 f m f i both i l ud h ont l ly k →  
 f m i i ros p  
 P l b k R g 3 p ctn e → A h m B nd d sc bes et on  
 C m m b x i N mes 2 → N me 5 m c d d ac s t l u e  
 F th / n d (3 y m)  
 An m re thy l y t m as t a i str wh m hu gwy l epy c ld t  
 R p i 3 dg t

## Tests While Up And Aboard

Er Wlk p a d w l e {m ap} l d l b t } b sh f et to a h t d→  
 Wlk p l e r t e f t  
 Add t t e t c f d b f  
 I mp p d w t f b th f t→f mp d wn foun stood or horto n at r th both f t  
 p k b fl→w k t p t wh t wo→bal nce m m ata by n f t  
 b j mp k ( g b H o th r b j t)  
 Co out 4 p d d = s→Ued r t d s t l e t l p p t z

## CRANIAL NERVES

## I Olfactory

- A. SUBJECTIVE Impairment of sense of smell olfactory hallucinations indicate attacks
- II OBJECTIVE Test each nostril naming odors used

## II Optic

- A. SUBJECTIVE Failing vision field defects
- II OBJECTIVE
  - 1) *Visual acuity*—examined by Snellen test types
  - 2) *Fields of vision*—perimetry is indicated in all suspected cases of intracranial or pituitary tumor or when rough tests have suggested defects
  - 3) *Fundi*—ophthalmoscopic examination

## III IV VI Oculomotor Trochlear Abducens

- A SUBJECTIVE Double vision
- B OBJECTIVE
  - 1) *Pupils*—size equality regularity reaction on convergence and to light directly and consensually
  - 2) *Ocular movements*—both in response to command and on following a moving object note weakness of extraocular muscles describe strabismus and nystagmus
  - 3) *Eyelids*—ptosis weakness compare palpebral fissures

## V Trigeminal

- A MOTOR DIVISION
  - 1) *Subjective*—stiffness or weakness of muscles of mastication
  - 2) *Objective*—test masseter temporal and pterygoid muscles
- II SENSORY DIVISION
  - 1) *Subjective*—pain paresthesia or numbness of the face

## APPENDIX D 3

## Neurologic Examination

The following outline is to be employed in examining patients in whom a disturbance of the nervous system is suspected. It is assumed that a complete medical history and a physical examination of the patient have been recorded.

## HISTORY

1. Inquire specifically about the following symptoms related to the nervous system: headache, vomiting, dizziness, disturbances of consciousness, disorders of cerebation and of speech, motor disturbances, disorders of gait. Describe in detail convulsive attacks or other involuntary movements, pains or paresthesias, and sphincter disturbances.
2. Inquire carefully regarding injury to the head or spine.
3. Note exposure to alcohol, heavy metals, or other poisons.
4. Record relevant hereditary data.

## CEREBRATION

Survey the mental status, noting attention, concentration, orientation, memory, emotional state, intelligence, hallucinations, delusions, obsessions, change in habits, disposition.

## PERFORMANCE OF SKILLED ACTS

Record whether right- or left-handed.

## 1 Speech

Note spontaneous speech, answers to questions, performance of test phrases. In the presence of dysphasia, a complete psychomotor study is indicated.

## 2 Handwriting

Specimen.

## 3 Practical Response on Command

Test for apraxia.

## CRANIAL NERVES

## I Olfactory

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## V Trigeminal

- A MOTOR DIVISION
- 1) *Subjective*—stiffness or weakness of muscles of mastication
  - 2) *Objective*—test masseter temporal and pterygoid muscles
- B SENSORY DIVISION
- 1) *Subjective*—pain paresthesia or numbness of the face



- 2) *Objective*—test sensation for each of the 3 divisions

C CORNEAL REFLEX Right left

## VII Facial

### A MOTOR DIVISION

- 1) *Subjective*—stiffness or weakness of facial musculature
- 2) *Objective*—note asymmetry of the face at rest on volition and on emotion describe part involved noting whether weakness is of central or peripheral type

### B SENSORY DIVISION

- 1) *Subjective*—impairment of sense of taste
- 2) *Objective*—examine taste on anterior two thirds of the tongue in all peripheral facial lesions (chorda tympani)

## VIII Acoustic

### A AUDITORY DIVISION

- 1) *Subjective*—tinnitus impairment of hearing
- 2) *Objective*—(a) Note distance for hearing watch and whisper—right left (b) Test air conduction further by tuning fork C128 and C2048 (c) Test bone conduction with C128 comparing 2 sides (d) Compare bone conduction and air conduction on each side (Rinne) (e) With tuning fork in midline test for lateralization (Weber)

### B VESTIBULAR DIVISION

- 1) *Subjective*—vertigo vomiting
- 2) *Objective*—in patients with vertigo or nerve type of deafness special tests of vestibular function are indicated (Bárány)

## IX X Glossopharyngeal Vagus

- A SUBJECTIVE Difficulty in swallowing change in voice pain
- B OBJECTIVE Note movement of the palate on phonation and of the larynx on deglutition laryngoscopic

examination is indicated in disturbances of phonation  
Pharyngeal and palatal reflexes—right left Slowing  
of pulse

## **XI Accessory**

Test strength of sternocleidomastoid and trapezius muscles

## **XII Hypoglossal**

**A SUBJECTIVE** Disturbance of articulation

**II OBJECTIVE** Note deviation of tongue on protrusion and strength of lateral movements atrophy and fibrillation

# **VOLUNTARY MOTOR SYSTEM**

## **1 Attitude and Posture**

Note natural position assumed in the recumbent sitting and standing posture—head trunk and limbs Note especially retraction of the neck Kernig's sign Describe deformities contraction or limitation of free range of movement at the joints

## **2 Gait**

Describe with eyes open and closed walking forward side wise backward on a line in a circle

## **3 Muscle Status**

**A TONUS** Type and distribution

**II ATROPHY OR HYPERTROPHY** Groups or individual muscles involved

## **4 Muscle Strength**

**A UPPER LIMBS** Movements of the limbs and fingers power of the grip movements at the wrist joint pronation and supination of the forearm movements at the elbow joint and movements at the shoulder joint

- B THE TRUNK Movements of the head and spine abdominal muscles diaphragm intercostal muscles
- C LOWER LIMBS Movements of the toes movements at the ankle joint knee joint and hip joint

In lesions of the lower motor neurone type record the power of the individual muscles in outline form Electrical reactions are also indicated

## 5 Coordination

- A EQUILIBRIUM Eyes open and closed. (a) Arms out stretched patient in sitting posture (b) Balancing on 1 foot (c) Standing with feet together (Romberg)
- B SPECIAL TESTS Eyes open eyes closed right, left. (a) Finger to nose (b) Pointing and past pointing (c) Heel to knee to toe and to object above—patient recumbent. (d) Rapidly alternating movements—both upper and lower limbs Diadochokinesia
- C PERFORMANCE OF NATURAL ACTS

## 6 Involuntary Movements

Note tremors twitchings choreiform or athetoid movements tonic or clonic spasms tics Describe effect of rest volition emotion, or other factors

## GENERAL SENSORY SYSTEM

### 1 Cutaneous Sensation

- A TOUCH Wisp of cotton
- B PAIN Pinprick
- C TEMPERATURE Test tubes containing hot and cold water

### 2 Deep Sensation

- A MUSCLE TENDON AND JOINT SENSE Posture and passive movement
- B PAIN Deep pressure note tenderness on pressure over nerve trunks
- C VIBRATORY Tuning fork

**3 Combined or Discriminatory Forms**

A TACTILE LOCALIZATION Topognosis

B TACTILE DISCRIMINATION 2 point.

C APPRECIATION OF FORM AND TEXTURE Stereognosis

**REFLEXES**

Right

Left

**1 Deep \***

Jaw (pons)

Biceps (C 5 6)

Radial (C 5 6)

Triceps (C 7 8)

Knee jerk (L 3 4)

Ankle jerk (S 1 2)

**2 Superficial**

Upper abdominal (T 8 10)

Lower abdominal (T 10 12)

Cremasterics (L 1 2)

Plantar† (L 1 S 2)

**3 Visceral Reflexes**

Vesical sphincter ✓

Rectal sphincter

**SKELETAL SYSTEM****1 Skull**

Describe any abnormality in size or shape. Note tenderness on palpation or change in percussion note (Macewen). Auscultate for bruit.

Record as follows — 0 bs t +sl rxsh ++acti +++hyperacti  
 ++++cl us  
 fReprese t dir ct n f b g toe by rrow g f indicates B b nski phe-  
 n m n.

**2 Spine**

Note deformity limitation of movement tenderness of spinous processes

**3 Soft Tissues**

Abnormal vascularity scars tumors

**AUTONOMIC NERVOUS SYSTEM****1 Cervical Sympathetic**

Note dilation of pupil to shade enophthalmos or exophthalmos ciliospinal reflex

**2 Disorders of the Thoracic and Abdominal Portions of the Sympathetic****3 Angioneuroses****4 Abnormalities of Sweating****5 Trophic Disorders****6 Peripheral Vascular**

Blushing temperature of skin after prolonged exposure comparison of 2 sides

**ENDOCRINE SYSTEM**

Note any disorders of function

**CEREBRAL LOCALIZATION**

In those cases in which the neurologic examination has suggested the possibility of an intracranial tumor the following schema should be used in localizing the lesion

**1 Frontal**

Various combinations of the following

A PREFRONTAL Alteration of character and temperament failure of memory intellectual dullness euphoria and

facetiousness defect in attention neglect of sphincters  
contralateral grasping and groping reflexes

- II POSTFRONTAL OR PRECENTRAL Contralateral motor phenomena either irritative (convulsive) or paralytic disturbances of conjugate ocular deviation to opposite side motor dysphasia (depending on handedness) contralateral ataxia
- C SUBFRONTAL Ipsilateral anosmia exophthalmos optic atrophy central scotoma defects in visual fields

## 2 Temporal

Uncinate fits—hallucinations of taste and smell, dreamy states sensory dysphasia—word deafness and various other types (depending on handedness) contralateral upper quadrantic defects of the visual fields contralateral hallucinations of light or form mild contralateral hemiparesis especially of the face

## 3 Parietal

- A POSTCENTRAL AND PARACENTRAL Generalized or Jacksonian convulsive seizures preceded by contralateral sensory aura contralateral sensory disorder of cortical type impairment of joint sensation point discrimination point localization and stereognosis
- B PARIETO-OCCIPITAL REGION (supramarginal and angular gyri) Contralateral lower quadrantic defects of the visual fields visual inattention visual agnosia—word blindness defect in perception of depth and distance (depending on handedness) disturbance of optic nerve nystagmus

## 4 Occipital

Contralateral homonymous hemianopic defects complete or incomplete depending on location and extent simple visual hallucinations

## 5 Cerebellum

Ataxia vertigo reeling gait (uninfluenced by closure of the eyes) asynergia dysmetria adiadochoknesia (inability to

perform rapidly alternating movements) nystagmus hypotonia, pendulation of knee jerks rebound phenomenon

- A VERMIS Tendency to fall forward or backward no unilateral preponderance of incoordination
- B LATERAL LOBE Tendency to fall sideways (usually to ward side of lesion) preponderance of incoordination in ipsilateral limbs predominance of nystagmus on ocular deviation toward side of lesion
- C CEREBELLOPONTINE ANGLE Tinnitus attacks of vertigo progressive nerve deafness and absent vestibular reactions on the side of the lesion variable ipsilateral cerebellar signs and involvement of cranial nerves V VI and VIII rare involvement of IX and X hemiplegic symptoms

## 6 Pituitary

- A NEIGHBORHOOD SYMPTOMS Bitemporal hemianopic visual defect often beginning as a paracentral scotoma or as a notch at the periphery of the upper quadrants primary optic atrophy (optic chiasm) ocular palsies paresthesia in domain of ophthalmic nerve (sphenoidal fissure) proptosis edema of conjunctivae and eyelids (cavernous sinus) somnolence polyuria and polydipsia (tuber cinereum) uncinuate fits (temporal lobe) mental dulness anosmia (frontal lobe)
- B GLANDULAR SYMPTOMS Acromegaly alteration of basal metabolic rate and glucose tolerance adiposity abnormalities of skin and hair deviation of sexual development and function and secondary sexual characteristics

## PSYCHOMOTOR FUNCTIONS

### 1 Spontaneous Speech

- (1) Choice of words—extent of vocabulary
- (2) Pronunciation
- (3) Tendency to misplace or omit words or syllables
- (4) Tendency to repetition echolalia, paraphasia jargon
- (5) Tendency to preservation of automatic mechanisms

**2 Auditory Perception**

- (1) Answers to spoken questions
- (2) Understanding of articulate sounds
- (3) Appreciation of music
- (4) Repetition of words phrases sentences

**3 Visual Perception**

- (1) Reading
- (2) Answers to written questions
- (3) Understanding of pictures
- (4) Appreciation of time (watch)

**4 Tactile Perception**

Appreciation of form and texture—stereognosis

**5 Writing (use of nonparalyzed hand)**

- (1) Spontaneous—name address time
- (2) Writing to dictation
- (3) Copying—letter words sentences
- (4) Drawing—square tree dog
- (5) Tendency to mirror writing

**6 Intellectual Components of Speech**

- (1) Ability to correlate word memories
- (2) Synonyms and definitions

**7 Practical Response**

- (1) Mimicry—gestures and pantomimic movements
- (2) Practical responses to spoken commands
- (3) Practical responses to written commands
- (4) Appreciation of identities and uses of objects

**SUMMARY****1 Positive Findings**

- (1) Subjective
- (2) Objective



**DIAGNOSIS**

State impression in terms of

- 1 Etiologic factor or nature of lesion
- 2 Localization of lesion or anatomic damage
- 3 Functional disorder or syndrome

**APPENDIX D-4****Orthopedic Examination****INTRODUCTION**

The orthopedic examination is concerned chiefly with the musculoskeletal system. Such an examination is only a supplement to the careful and complete general history and physical examination. The orthopedic examination is concerned with *deformity, joint mobility, and muscle changes*, such as wasting or hypertrophy.

**1 Deformity**

This may be *angular* as in malunion of a fracture, severe bowing due to rickets, or scoliosis. Deformity may manifest itself as *shortening* of an extremity due to dislocation, malunion of a fracture, or epiphyseal growth disturbance. Deformity may be *rotational* as in tibial torsion or anteversion of the femoral neck. Deformity may present itself as a *mass* or enlargement due to overgrowth of bone or soft tissue as in tumors.

**2 Joint Mobility**

Limitation of joint motion is an important physical sign and its cause must be determined. The difference between active and passive joint motion should be understood. Should a patient lack active knee extension but the exami-

ner be able to extend this knee passively an extra articular cause of the active limitation should be sought (i.e. paralysis of quadriceps etc.) Limitation of both passive and active motion may be caused by

- A **MUSCLE SPASM** Due to pain as in acute back strain or due to spasticity of central origin as in hemiplegia
- B **CONTRACTURE** Of capsule ligaments and muscles controlling joint motion (any type of arthritis)
- C **MECHANICAL BLOCK** By bone or cartilage (torn meniscus of the knee)
- D **BONY ANKYLOSIS** Rheumatoid arthritis septic arthritis surgical fusion

## HISTORY

Most of the pertinent facts are recorded in the basic outline of history and physical examination. Special attention should be given to (1) the date and mechanism of onset of the patient's complaint (2) a detailed description of pain (type of pain radiation what aggravates it what relieves it) (3) the type of previous treatment and the response to treatment.

## EXAMINATION

The only instruments needed for the orthopedic portion of the examination are a measuring tape reflex hammer and a firm examining table. Measurements should be taken from 1 bony landmark to another (anterior superior iliac spine to medial malleolus for leg length). Measurements of circumference should be at stated levels (i.e. thigh 11 in. above the patella). Measurements of joint motion should be stated in a manner clear to any reader (i.e. the knee extends to 120 degrees and flexes to 40 degrees). Corresponding measurements of the opposite joint should be recorded.

The following is a brief summary of the more important points to be noted in examination of certain areas of the body

### 1 The Back

First note the patient's gait and ability to move about to dress and to undress. Note the spinal curves (lordosis

kyphosis scoliosis) Observe paravertebral muscle spasm asymmetry of flank folds tilting of the pelvis and range of motion of the spine in all directions Record at what level back motion takes place and at what level it is restricted Careful palpation of bony prominences and muscle groups should be carried out The straight leg raising test is done with the patient in the supine position by gradually elevating the leg with the knee extended A careful neurologic evaluation should be made in conjunction with the examination of the back

## 2 The Cervical Spine

Note the manner in which the patient holds his head Note tightness of any muscle groups particularly the sternocleidomastoid Note range of motion flexion extension lateral bending and turning in both directions On palpation identify the spinous processes of C2 and C7 Note any tenderness or mass Skeletal lesions of the cervical spine are frequently associated with nerve changes and a careful neurologic evaluation should be made

## 3 The Hip

Careful inspection of the patient's gait should be made The Trendelenburg test is carried out by having the patient stand on the affected leg while elevating the normal side The normal side of the pelvis will drop with a positive test Note the level of the trochanters in relation to the iliac crest Deep palpation of the hip joint both anteriorly and posteriorly may detect a mass or deformity Note the range of motion in abduction adduction flexion extension internal and external rotation Be sure the pelvis is fixed by holding the opposite hip flexed so as to record only hip motion and not lumbar spine motion Measure for leg shortening and for thigh atrophy Remember hip disease may cause knee pain

## 4 The Knee

Note evidence of swelling heat or tenderness Note the range of flexion and extension Test the collateral ligaments

by passive abduction and adduction of the extended knee. Test the anterior cruciate ligament by drawing the tibia forward from the femur with the knee flexed (opposite test for posterior cruciate). Palpate the following: patella, patellar ligament, suprapatellar pouch, joint line, anterior medial and lateral to the patellar ligament. Ballot the patella (patella click test for joint fluid). Palpate the popliteal space for mass or tenderness. Measure thigh circumference.

## 5 The Ankle and Foot

Note evidence of swelling or deformity. Note range of ankle motion (flexion and extension only). Note subastragalar motion (inversion and eversion). Palpate the medial malleolus and deltoid ligament, lateral malleolus and lateral ligament, tarsal, metatarsal and toe bones and joints. Note any evidence of abnormal callus, hammer toes, hallux valgus, equinus or calcaneus deformities, varus or valgus or cavus deformities.

## 6 The Shoulder

Inspect shoulder for general contour and note any atrophy with particular attention to deltoid and supraspinatus muscles. Palpate the area around the acromion process (note tenderness particularly over subdeltoid or subacromial bursa). Palpate the coracoid process and bicipital groove, the acromioclavicular and sternoclavicular joints. Test the range of shoulder motion (abduction, adduction, flexion, extension, internal and external rotation). In recording range of shoulder motion, be sure to record scapulohumeral motion and distinguish it from scapulothoracic motion. This may be done by holding the scapula and clavicle firmly down with 1 hand while testing passive motion of the shoulder with the other.

## 7 The Elbow

Inspect the elbow for deformity (swelling, changes in contour, change in normal carrying angle). On palpation the following anatomic points may be distinguished: medial and lateral epicondyle, olecranon, radial head, ulnar nerve.

and biceps tendon. Record the range of flexion, extension, pronation, supination. Note any evidence of swelling or tenderness and relate this to the anatomic area palpated.

## 8 The Wrist and Hand

Inspect the hand and wrist for swelling and change in color or contour. Note any evidence of specific types of deformities caused by ulnar, median or radial nerve injury. Volkman's contracture or rheumatoid arthritis. Palpate the following anatomic points: radial and ulnar styloid, anatomic snuff box, for the carpal navicular, the individual metacarpal bones and phalanges. Note the range of motion in the wrist: flexion and extension, radial and ulnar deviation and pronation and supination. Record motions in fingers and metacarpo-phalangeal joints. Specific tests for nerve and tendon injuries should be done when indicated. Motor power in the small hand muscles should be noted particularly abduction and adduction of the fingers and opposition of the thumb. Sensory testing to pin point and light touch should be carried out.

## APPENDIX D 5

# Emergency Examination

Gentleness and reassuring calmness are imperative in the examination of the emergency patient. Where abdominal disease or injury is suspected, greater injury can be avoided and the confidence and cooperation of the patient assured by cautious, careful and gentle palpation and manipulation. If a broken bone is suspected, never try to elicit the ancient and now dishonored signs of pain and crepitation by motion. *Take an x ray!* If an injury to the vertebral column or the spinal cord is suspected, do not ever allow the patient to sit up or even to be moved without constant upward traction on the head. This policy must not be violated until you personally are

satisfied that the x rays are negative Do not contaminate probe or instill liquids into bleeding or draining ears

1 *Is the patient breathing?* If not ■ the airway obstructed? Elevate the chin and aspirate the air passages to clarify this

■ *Is the patient bleeding?* If so can the hemorrhage be controlled by pressure hemostat or tourniquet?

3 *Is the patient breathing* (strongly weakly irregularly) *but cyanotic?* Is he wheezing or is there stridor? Is there retraction of the chest wall or supraclavicular areas or use of the accessory muscles of respiration? Is there deviation of the trachea or asymmetry of the chest with respiration? If so ■ the airway partially obstructed is the rib cage crushed is there ■ sucking wound into the chest or have the pleural spaces become occupied by blood or air?

4 *Can the pulse be felt?* If not or if it is weak rapid or thready is the patient in shock as demonstrated by an abnormal lowering of the blood pressure?

5 *Is the blood pressure abnormally low?* If so is this due to loss of blood externally or internally into a body cavity or into a relaxed vascular bed or is it due to heart failure?

6 *Is the patient conscious and alert?* If the sensorium is depressed or the patient is unconscious is the departure from normal due to cerebral anoxia from an expanding intracranial lesion from shock from injury to the brain from a convulsive seizure from alcohol drugs or poisons or from a metabolic disturbance such as diabetes?

7 *Does the patient have anesthesia or paralysis?* If so is this due to injury to the brain spinal cord or ■ peripheral nerve?

■ *Is the patient in pain?* ■ so where does he hurt? The localization of pain is an invaluable clue to the site of the injury

9 *Is the rectal temperature elevated?* If so is the rise due to a systemic or a localized infection or to a failure of the heat regulating mechanism or to a foreign protein reaction other than a bacterial toxin?

10 *Laboratory procedures* are adjunctive and should be employed judiciously and only in seeking answers to the foregoing questions It usually is important to record on a special graph the pulse blood pressure and respiration readings taken every 15 minutes

**11 Conclusions** If the patient is not bleeding if he has normal pulse respirations blood pressure and temp rature and if he is conscious and alert without subjective evidence of pain or objective evidence of injury he does not present in emergency and may be examined in the usual manner

*N B If for any reason a poison is suspected and you are not sure of the diagnosis or treatment consult immediately your nearest Poison Control Center listed below*

### POISON CONTROL CENTERS

#### ALABAMA

##### ANNISTON

Anniston Memorial Hospital  
Tel AD 7 5421

##### BIRMINGHAM

University of Alabama  
Medical Center  
Tel 53 3531

##### FLORENCE

Eliza Coffey Memorial  
Hospital  
Tel AT 2 8321

#### ARIZONA

##### PHOENIX

Maricopa County Medical  
Society  
Tel Alpine 8 8331

##### TUCSON

University of Arizona  
Tel MA 4 8181

#### ARKANSAS

##### LITTLE ROCK

University of Arkansas  
Medical Center  
Tel Franklin 2 4351

#### CALIFORNIA

##### BERKELEY

Herrick Memorial Hospital  
Tel Thornwall 5 0130

##### LOS ANGELES

University of California  
Medical Center  
Tel Bradshaw 2 8911

Children's Hospital Society  
of Los Angeles  
Tel Normandy 4 2121

##### MARTINEZ

Contra Costa County  
Hospital  
Tel Martinez 3080

##### OAKLAND

Alameda—Contra Costa  
Medical Assoc  
Tel Olympic 2 8171

Children's Hospital of the  
East Bay  
Tel Olympic 2 1143

Highland—Alameda  
County Hospital  
Tel Kellogg 2 1122

##### ORANGE

Orange County General  
Hospital  
Tel Kellogg 8 2331

**SAN FRANCISCO**  
 Central Emergency Hospital  
 Tel Hemlock 1 7800  
 Children's Hospital  
 Tel Bayview 1 200

**SAN JOSE**  
 San Jose Emergency First  
 Aid Station  
 Tel Cypress 2 3141

**SAN LEANDRO**  
 Fairmount Hospital of  
 Alameda County  
 Tel Elgin 1 800

**SAN MATEO**  
 Community Hospital of  
 San Mateo  
 Tel Fireside 5 2721

**SANTA CLARA COUNTY**  
 Santa Clara County Hospital  
 Tel Cypress 3 0762

**SAN RAFAEL**  
 Marin General Hospital  
 Tel Glencourt 3 3110

## COLORADO

**DENVER**  
 Department of Health and  
 Hospitals  
 Tel Tabor 5 1331

## CONNECTICUT

**BRIDGEPORT**  
 Bridgeport Hospital  
 Tel Edison 4 0131  
 St Vincent's Hospital  
 Tel Forest 6 3601

**HARTFORD**  
 St. Francis Hospital  
 Tel Chapel 9 8781

**MIDDLETOWN**  
 Middlesex Memorial  
 Hospital  
 Tel Fireside 8 2681

**NEW HAVEN**  
 New Britain General  
 Hospital  
 Tel Baldwin 3 7761

**STAMFORD**  
 Stamford Hospital  
 Tel Fireside 8 7601

**WATERBURY**  
 St Mary's Hospital  
 Tel Plaza 6 8731

## DELAWARE

**WILMINGTON**  
 Delaware Hospital  
 Tel Olympia 5 3389

## DISTRICT OF COLUMBIA

**WASHINGTON**  
 Children's Hospital  
 Tel Dupont 7-4220  
 Ext 250

## FLORIDA

**DAYTONA BEACH**  
 Halifax District Hospital  
 Tel Clinton 2 5561

**FORT LAUDERDALE**  
 North Broward General  
 Hospital  
 Tel Jackson 2 3611

**FORT MYERS**  
 Lee County Hospital  
 Tel Edison 7 1141



## POISON CONTROL CENTERS

## GAINESVILLE

Alachua General Hospital  
Tel Franklin 2-4321

## JACKSONVILLE

St Vincent's Hospital  
Tel Evergreen 9 7761

## LAKELAND

Morrell Memorial Hospital  
Tel Mutual 4 4211

## MIAMI

Jackson Memorial Hospital  
Tel Franklin 1 9611

## MIAMI BEACH

Mt Sinai Hospital  
Tel Jefferson 8 8421

## OCALA

Munroe Memorial Hospital  
Tel Marion 2 4211

## ORLANDO

Orange Memorial Hospital  
Tel Orlando 3 5511

## PANAMA CITY

Memorial Hospital of  
Bay County  
Tel Sunset 5 7411

## PENSACOLA

Baptist Hospital  
Tel Hemlock 8 5423

## ST PETERSBURG

Mound Park Hospital  
Tel Mound Park 5 1181

## SARASOTA

Sarasota Memorial Hospital  
Tel Ringling 6 8831

## TALLAHASSEE

Tallahassee Memorial  
Hospital  
Tel 7 8060

## TAMPA

Tampa Municipal Hospital  
Tel 8-4321

## WEST PALM BEACH

Good Samaritan Hospital  
Tel Temple 3 1741

## GEORGIA

## ALBANY

Phoebe Putney Memorial  
Hospital  
Tel Hemlock 3 3321

## ATLANTA

Grady Memorial Hospital  
Tel Cypress 4711

Department of  
Pharmacology  
Emory University School  
of Medicine  
Tel Drank 3 1621

## AUGUSTA

University Hospital  
Tel Park 2 7731

Department of Pediatrics  
Medical College of Georgia  
Tel Park 4 7461

## COLUMBUS

The Medical Center  
Tel Fairfax 2 2521

## FORT OGLETHORPE

Tri County Hospital  
Tel 84 2654

## SAVANNAH

Memorial Hospital  
Tel Elgin 5 3200

## HAWAII

## HONOLULU

Kaunakakai Children's  
Hospital  
Tel 5-4563

## ILLINOIS

## AURORA

St Charles Hospital  
Tel 8714

## CHICAGO

Mercy Hospital  
Tel Victory 2-4700

## EFFINGHAM

St Anthony's Hospital  
Tel 850

## EVANSTON

Evanston Hospital  
Tel Greenleaf 5 2500

St Francis Hospital  
Tel Davis 8 7200

Community Hospital  
Tel University 4 9400

## GRANITE CITY

St Elizabeth's Hospital  
Tel Triangle 6 2020

## JOLIET

Will County Health Dept  
Tel Saratoga 6 6795

## KANKAKEE

St Mary's Hospital  
Tel 3 4451

## SPRINGFIELD

Memorial Hospital  
Tel 2 3361

St John's Hospital  
Tel 7 6881

## INDIANA

## EAST CHICAGO

St Catherine Hospital  
Tel Export 7 3080

## ELKHART

Elkhart General Hospital  
Tel 3 5350

## HAMMOND

St Margaret Hospital  
Tel Westmore 2 2300

## INDIANAPOLIS

Poison Control Center  
Tel Walnut 5 1677

General Hospital  
Tel Melrose 6 6331

## IOWA

## DES MOINES

Iowa Poison Information  
Center  
Tel Atlantic 8 7111

## FORT DODGE

Lutheran Hospital  
Tel 4 0911

## KANSAS

## TOPEKA

Stormont Vail Hospital  
Tel Topeka 5 2361  
Ext 218

## KENTUCKY

## FORT THOMAS

St Luke's Hospital  
Tel Highland 1 1600 Ext 74

## LEXINGTON

Baptist Hospital  
Tel 4 8820

## POISON CONTROL CENTERS

## LOUISVILLE

Louisville General Hospital  
Tel Juniper 2 1831

## WORCESTER

Worcester City Hospital  
Tel Pleasant 6 1551

## PADUCAH

Western Baptist Hospital  
Tel 5 6361 Ext 21

## MICHIGAN

## BATTLE CREEK

Calhoun County Health  
Dept  
Tel Woodward 2 6781

## NEW ORLEANS

Louisiana State University  
School of Medicine  
Tel Magnolia 6692

## DETROIT

Herman Kiefer Hospital  
Tel Trinity 2 3334

## MARYLAND

## BALTIMORE

Baltimore City Hospital  
Tel Dickens 2 5400  
Johns Hopkins Hospital  
Tel Orleans 5 5500  
University of Maryland  
Hospital  
Tel Lexington 9 0020

## FLINT

Hurley Hospital  
Tel Cedar 2 1161

## GRAND RAPIDS

Butterworth Hospital  
Tel Glendale 1 3591  
Blodgett Memorial Hospital  
Tel Glendale 6 5301  
St Mary's Hospital  
Tel Glendale 9 3131

## BETHESDA

Suburban Hospital  
Tel Oliver 4 6750

## PONTIAC

St Joseph Mercy Hospital  
Tel Federal 4 3511

## MASSACHUSETTS

## BOSTON

Children's Medical Center  
Tel Beacon 2 7800

## PORT HURON

Mercy Hospital  
Tel Yukon 5 9531

## MINNESOTA

## NEW BEDFORD

St Luke's Hospital  
Tel Wyman 9 6211  
Ext 359

## MANKATO

Immanuel Hospital  
Tel 8 1606

## SPRINGFIELD

Dept of Public Health  
Tel Republic 9 2536

## MINNEAPOLIS

Minnesota State  
Department of Health  
Tel Federal 9 7751

North Memorial Hospital  
Tel Juniper 8 753

Northwestern Hospital  
Tel FE 2 7266

Minneapolis General  
Hospital  
Tel Federal 3 1178

#### ST CLOUD

St Cloud Hospital  
Tel Blackburn 700

#### ST PAUL

Bethesda Hospital  
Tel Capital 4 7561

The Children's Hospital  
Tel Capital 7 6521

St John's Hospital  
Tel Prospect 1 5521

St Luke's Hospital  
Tel Capital 4 6501

#### MISSISSIPPI

#### LAUREL

Jones County Community  
Hospital  
Tel 8 7236

#### MISSOURI

#### CAPE GIRARDEAU

St Francis Hospital  
Tel ED 5 3375

#### KANSAS CITY

Kansas City General  
Hospital #1  
Tel Harrison 1 8060

Mercy Hospital  
Tel Grand 1 5250

#### ST LOUIS

St Louis Children's  
Hospital  
Tel Forest 7 6880

Homer G Phillips City  
Hospital  
Tel Franklin 1 3100

St Louis City Hospital  
Tel Central 1 7300

Cardinal Glennon Memorial  
Hospital for Children  
Tel Mohawk 4 7222

#### NEBRASKA

#### OMAHA

Children's Memorial  
Hospital  
Tel Glendale 5400

#### NEW JERSEY

#### ATLANTIC CITY

Atlantic City Hospital  
Poison Control Center  
Tel Atlantic City 5 2112

#### CAMDEN

West Jersey Hospital  
Tel Woodlawn 3 8830

#### LONG BRANCH

Monmouth Memorial  
Hospital  
Tel Capitol 3 5200

#### MONTCLAIR

Mountainside Hospital  
Tel Pilgrim 6 6000

#### MORRISTOWN

All Souls Hospital  
Tel JE 3 0900

## POISON CONTROL CENTERS

Memorial Hospital  
Tel JE 8-4500

NIAGARA FALLS  
Niagara Falls Memorial  
Hospital  
Tel 5761

NEPTUNE  
Fitken Memorial Hospital  
Tel Prospect 5 5500

ROCHESTER  
Strong Memorial Hospital  
Tel Greenfield 3 4400  
Ext 224

NEWARK  
Babies Hospital  
Tel Humboldt 2 6200

SYRACUSE  
City Hospital  
Tel Granite 6 3166

NUTLEY  
The Nutley Child Safety  
Program  
Tel Nutley 2 0139

## NORTH CAROLINA

SOUTH ORANGE  
Orange Memorial Hospital  
Tel 5 1100

DURHAM  
OPD Duke University  
Hospital  
Tel Durham 9011  
Ext 398

## NEW MEXICO

ALAMOGORDO  
Polon Control Center  
Tel 204

JACKSONVILLE  
Onslow Memorial Hospital  
Tel 7241

## NEW YORK

NEW YORK CITY  
New York City Department  
of Health  
Tel Worth 4 3800  
Ext 680

## NORTH DAKOTA

BISMARCK  
Quain and Ramstad Clinic  
Tel Capitol 3 1420

ALBANY  
Albany Hospital  
Tel Albany 8-4541

FARGO  
The Dakota Clinic  
Tel Adams 5 6466

BUFFALO  
Buffalo Children's Hospital  
Tel Summer 5 1000  
Ext 242

GRAND FORKS  
Medical School  
University of North Dakota  
Tel 4 6211

## OHIO

ELMIRA  
St Joseph's Hospital  
Tel 6241

AKRON  
Children's Hospital  
Tel Blackstone 3 5531

**CINCINNATI**

The Kettering Laboratory  
Tel CA 1414

**CLEVELAND**

Cleveland Academy of  
Medicine  
Tel Cedar 1 3500

**COLUMBUS**

The Children's Hospital  
Tel Clearbrook 8 9785

**MANSFIELD**

Mansfield General Hospital  
Tel 4771 6

**TOLEDO**

Poison Information Center  
of Greater Toledo  
Tel Cherry 4 1961

**OKLAHOMA****OKLAHOMA CITY**

University of Oklahoma  
Medical Center  
Tel RE 6 1511 Ext 358

**OREGON****PORTLAND**

Oregon Poison Control  
Registry  
Tel Capitol 8 9181 (day)  
Capitol 8 5546 (night)

**PENNSYLVANIA****ALLENTOWN**

Allentown Hospital Assoc  
Tel Hemlock 4 7161

**DANVILLE**

George F Geisinger  
Memorial Hospital  
Tel 1250

**ERIE**

Harnot Hospital Assoc  
Tel 2 6991

**HARRISBURG**

Harrisburg Hospital  
Tel Cedar 8 5221  
Polyclinic Hospital  
Tel CE 8 7361

**LANCASTER**

St Joseph Hospital  
Tel Express 4 7181

**PHILADELPHIA**

Philadelphia Department of  
Public Health  
Tel WA 2 5524

**SHARON**

Sharon General Hospital  
Tel 7 7701

**WILKES BARRE**

Mercy Hospital  
Tel Valley 2 8101

**SOUTH CAROLINA****COLUMBIA**

Columbia Hospital  
Tel Alpine 4 7387

**SOUTH DAKOTA****VERMILLION**

Dept of Pharmacology  
University of South Dakota  
Tel Market 4 4411

**TENNESSEE****JACKSON**

Madison General Hospital  
Tel 7 9651

## POISON CONTROL CENTERS

## KNOXVILLE

University of Tennessee  
Memorial Research  
Center and Hospital  
Tel 4 2961

## MEMPHIS

Le Bonheur Children's  
Hospital  
Tel Jackson 5 6341

## NASHVILLE

Vanderbilt Hospital  
Tel 9 5651

## TEXAS

## CORPUS CHRISTI

Memorial Hospital  
Tel Tulip 4 2411

## FORT WORTH

W I Cook Memorial  
Hospital Center for  
Children  
Tel Fortune 5521

## GALVESTON

John Sealy Hospital  
Tel Southfield 3 4541

## HOUSTON

Baylor University College  
of Medicine  
Tel Jackson 9-4951

## UTAH

## SALT LAKE CITY

Salt Lake County Hospital  
Tel Hunter 4 8612  
Ext 334

## VIRGINIA

## PORTSMOUTH

U S Naval Hospital  
Tel Export 9 2441

## RICHMOND

Medical College of Virginia  
Tel Richmond 7 9831

## WASHINGTON

## SEATTLE

Children's Orthopedic  
Hospital  
Tel Fillmore 4300

## SPOKANE

Deaconess Hospital  
Tel RI 7 4811

## WEST VIRGINIA

## PINE GROVE

The Pine Drug Store  
Tel Tuxedo 9 8500

## WISCONSIN

## MILWAUKEE

F J Mellencamp M.D.  
Chairman Poison Control  
Committee  
Tel Woodruff 3 9700

## APPENDIX D 6

# Evaluation of the Psychotic Patient and the Mental Status Examination

## INTRODUCTION

Whenever the patient is suspected of being psychotic the following mental status examination should be employed. It is to be used only as a guide so that its continued use will enable the examiner to learn methods of obtaining data intelligently from others and from the patient. One of the significant differences in the examination of a psychotic patient is that the history obtained from the patient must be supplemented by information from relatives, neighbors, ministers, other physicians, social workers, etc., who know the patient. If possible, these informants should be seen when the patient is brought to the hospital. Often these interviews will indicate errors, discrepancies, and omissions in the history, or will define more clearly the patient's statements. A number of such interviews frequently are required to obtain a correct estimate of the family structure and a satisfactory account of the patient's life experiences and the development of the present illness. At times the psychotic patient is unable to give any reliable history; nevertheless, what he does say should be recorded, although most of the data will have been obtained from other persons.

Mental illness frequently arouses resentment, guilt, and anxiety in relatives. These may manifest themselves by attitudes of defensiveness, shame, anger, or bewilderment. The doctor should be aware of this and attempt to make each interview an exercise in psychotherapy. In addition to obtaining much information from family members, the interviews should orient the family members, allay some of their anxiety, and give them a better understanding of the causes of emotional illness. The members of the family should be encouraged through their interest in the patient to share as much information as possible with the physician. They may also be told in general terms about some of the problems that the patient is



facing Obviously with improved understanding on the part of the relatives they will become more cooperative in following through recommendations for further care or hospitalization changes in the home and attitudes toward the patient However such discussions with the relatives should avoid the extremes of alarmism or undue optimism In speaking to them one should use language which is understandable in terms of their own culture pattern Special care should be exercised in protecting the patient's interests and not giving the relatives information that could be used against him or that could be misinterpreted by the family After the initial interview the family should be urged to ask for conferences whenever the physician feels they are indicated and they should be kept informed of the patient's progress When further information is needed from social health and judicial agencies in the community the physician usually will be helped considerably by referring such matters to the psychiatric social worker

In addition to historical data from the patient and others the mental status examination will help the examiner to detect slight or marked abnormalities in the thought processes and actual experiences of the patient This examination is not a legal inquiry but an outline to facilitate understanding of the patient's problems and observation of pertinent aspects of his behavior

## MENTAL STATUS EXAMINATION

### 1 General Description

A short description of what nurses students physicians and others in contact with the patient have observed

A DRESS Neat untidy eccentric appropriate to the occasion etc

B POSTURE Relaxed rigid tense erect recumbent etc

C FACIAL EXPRESSION Mobile fixed ecstatic depressed angry etc

D ATTITUDE Friendly aggressive cooperative resistive negativistic etc

E GENERAL MOOD Objective statements from observation—calm elated anxious irritable depressed tearful listless note variations and discrepancies between mood

and thought content and changes of mood at different times of the day

F **MOTOR ACTIVITY** Under or overactivity dystonia aimless movements

## **2 Stream of Talk**

Rate quality amount and form under pressure retarded blocked relevant logical coherent concise illogical disorganized flight of ideas neologisms word salad circumstantial rhyming punning loudness whispering screaming etc

## **3 Subjective Emotional Reaction and Mood**

In contrast to observed mood data on subjective mood are obtained by answers to questions such as How do you feel? What part of the day is most pleasant? Most difficult? Do you become angry depressed irritable frightened panicky? When? Why? At times do you feel you'd rather die than continue this way?

## **4 Content of Thought**

Great care must be exercised here to avoid direct questioning or to follow slavishly the outline. Many patients will not answer or will get angry if asked "Do you hear voices?" or "Do you see people who you know aren't there?" Yet these same patients may have hallucinations and can be much relieved if they are allowed tactfully to share these disturbing experiences with a physician. At one point or another they may need reassurance. They may ask for it saying "Doctor this sounds crazy." They should be reassured told that such things happen quite frequently to people under emotional stress.

### **A OBSESSIONS COMPULSIONS AND PHOBIC THOUGHTS**

Do you have thoughts that you are unable to control or rid yourself of? Do you fear storms heights crowds traffic? Are you compelled to follow a certain ritual while dressing eating or walking etc? Do you feel tense if the foregoing are not done?

- B FEELINGS OF UNREALITY AND DEPERSONALIZATION** Do you feel as if you were in a fog? Do things look dim or distant to you? Do things look as if they were in a dream? Do things that happen to you seem unreal? Do you feel unnatural?
- C DELUSIONS**—(This area should be approached gradually) Have you had any unusual unpleasant or perplexing experiences? Have you had any peculiar thoughts dreams imaginings? Does the patient express ideas which are clearly in error?
- D PERSECUTORY TRENDS** Are you considered friendly and popular? Do people like you? Do they talk about you? Are you suspicious of others? Do you feel wronged annoyed poisoned? How do you explain this?
- E PASSIVITY FEELINGS** Do you think others may be able to influence you? How? Do you think some people can read minds? Can they read yours? Control you? How?
- F SOMATIC TRENDS** Has any part of your body changed? Inquire about elimination senses digestion pain sweat genitals sexual powers
- G ILLUSIONS** (These are important in the examination of delirious patients although usually the presence of illusions is established on objective evidence) Do shadows or noises look peculiar or frightening to you? Do body sensation lead you to think you are being touched?
- H HALLUCINATIONS** This area should be approached gradually
- 1) *Auditory*—Do you hear buzzing in your ears? Noises? Do you know of anybody who ever heard noises? Did anything like this ever happen to you?
  - 2) *Visual*—Have you seen any flashes of light? Did you ever imagine you saw things as if in a dream? Have you imagined that you saw things and people and wondered whether you were dreaming or awake?
  - 3) *If hallucinations are acknowledged ask—*
    - a) *Auditory*—What do they say? Pleasant? Unpleasant? Whose voice? Man? Woman? In both ears? What does it mean? Are they talking to you About you?

- b) Visual— At night or day? Eyes open or shut? Where? What or whom do you see? What does it mean?
- c) Gustatory— Do things taste the same? Peculiar?
- d) Olfactory— Have you noticed any queer odors?

## 5 Sensorium Examination

This is particularly important when delirium or dementia is suspected. Its careful use will test attention, memory, grasp of general information and capacity for logical thought. Frequently this part of the examination may annoy or provoke the patient, as he is apt to equate direct questioning in areas of attention, memory and information as tests of intelligence. As a matter of fact much of what follows may be obtained casually and indirectly in eliciting the historical data in the conventional manner. Information concerning orientation and memory can be obtained by asking when the patient came to the hospital or about events which have transpired since his admission, etc. It is best when possible to avoid direct questioning and obtain information through indirect and casual means.

In instances in which the examiner feels that more comprehensive psychologic tests are indicated, he may arrange an appointment for the patient with a clinical psychologist. The psychologist may administer the projective tests as well as the more conventional psychologic tests.

**A ORIENTATION** Is he oriented for time (day, month, year), place, person and situation? Does the patient recognize doctors, nurses?

**B MEMORY**

- 1) *Remote past*—Use questions that can be checked, such as: How old are you? When were you born? When married? What age? Date of birth of children?
- 2) *Recent past*— Home address? Telephone number? When and how did you come to the hospital? Events in the past 24 hours? What happened when you first arrived in the hospital?
- 3) *Retention and recall*—Repeat forward 31759 or 42385 (7th year) repeat reversed 6528 or 4937 (9th

year) repeat reversed 15286 or 69482 (14th year)  
recall 375 Vine Street after 5 minutes 1 hour next  
day etc

- C GRASP OF GENERAL INFORMATION Name governor  
mayor last 5 presidents (3 is average) 4 large cities  
wars current events etc
- D CALCULATIONS Multiplication addition count coins  
simple arithmetical problems (may have been obtained  
from asking patient his age ages of children etc )
- E READING WRITING AND SPEECH Use test phrases obtain  
writing specimen to paste in the chart describe speech  
and writing have patient read Cowboy Story and  
note if patient gets meaning and can tell story note  
character of reading memory lapses errors and con-  
fabulation

A cowboy from Arizona went to San Francisco and  
took his dog which he left at a friend's while he pur-  
chased a new suit of clothes Dressed finely he went  
back to the dog whistled to him called him by name  
and patted him However the dog would have nothing  
to do with him in his new hat and coat and gave a  
mournful howl Coaxing was of no avail so the cowboy  
went away and donned his old garments whereupon the  
dog immediately showed his wild joy on seeing his  
master as he thought he ought to be

#### F LEVEL OF AWARENESS

- 1) *Attention span*—serial subtraction of 7's or 3's from  
100 (This test is dependent on at least a grammar  
school education ) Attention should be paid to the  
manner in which the test is performed It is not  
only a test of arithmetical ability but taxes continu-  
ously and repeatedly the ability to attend and con-  
centrate and is one of the most valuable tests in  
detecting slight changes in attention produced by  
delirium Long before arithmetical error is apparent  
the patient may betray his decreasing ability to per-  
form the task by heightened effort perseveration  
increase in total time of the test frequent hesitation  
or questioning requesting a new start or becoming  
irritable depreciating the test and the examiner

- 2) *Judgment*—does the patient show good or poor

judgment in general activities? Does he give due value to practical considerations? Can he distinguish between lie and mistake dwarf and child idleness and laziness poverty and misery character and reputation? Plans for the future Is judgment better on impersonal than on personal matters?

- 3) *Abstractions*—inquire about the meaning of proverbs such as A squeaking wheel gets the grease A rolling stone gathers no moss The apple falls near its tree The tongue is the enemy of the neck Note whether (1) interpretation is literal (2) the meaning of the proverb is understood (3) the patient sees any relationship to his personal situation and (4) all proverbs are interpreted in the light of his personal problems
- 4) *Insight*—(a) Give a verbatim statement of the patient's formulation of himself in his present situation (b) Is the patient aware of mental or physical defects? Does he realize that the difficulty is within himself or does he ascribe it to external sources? (c) Does he make any statement as to the emotional nature of his illness? Has he any insight into etiologic or dynamic factors?

## APPENDIX D 7

# Evaluation of the Comatose, Stuporous, or Uncooperative Patient

## INTRODUCTION

The comatose patient must be examined rapidly Necessary supportive therapy should be initiated immediately and continued even during the examination The stuporous or uncooperative patient should be closely observed until assistance is available for examination A number of important observations

have to be made quickly to reach a diagnosis and make a decision as to treatment

Negativism, stupor, catatonics, agitation or coma should be distinguished and recorded when the patient is in such a state. To wait for a clinical picture to change is to miss an opportunity and leave a gap in the clinical examination detrimental to the patient.

These states may be associated with a wide variety of neurologic, metabolic, circulatory, toxic, traumatic or psychiatric disorders, so it is essential to investigate the patient's immediate status in accordance with a definite plan.

## HISTORY

### 1 General

Obtain as accurate an account as possible of the patient's past history, recent complaints and the onset, early and late symptoms of the present illness. Inquire about the duration of any lucid intervals and the period of secondary unconsciousness. *Do not allow relatives, friends, passers by, or the police to leave until they have been questioned by the physicians who will ultimately be in direct charge of the patient. If necessary, send the police or a social worker after them. Identify the informant for each item in the history.*

### 2 Injury

Get specific details of the time, type and place of accident, particularly in the case of head injuries. Inquire about the patient's state of responsiveness and behavior during and after the accident from the patient if possible, or any available witness. Remember that the case may have medicolegal implications.

### 3 Drug Ingestion

Inquire specifically about alcohol (do not let a history of ingestion lead you to overlook a possible head injury). Antabuse, barbiturates, bromides, opiates, tranquilizers.

salicylates nose drops cyanide or other poisons (See Appendix D 5 p 88 for Poison Control Centers )

#### 4 Metabolic Diseases

Inquire about a history of diabetes look for a diabetic identification card or needle marks consider both acidosis and hypoglycemia Inquire about renal or liver disease and consider uremia and hepatic coma Eclampsia in the female and the possibility of thyrotoxicosis myxedema and pellagra should be considered

#### 5 Central Nervous System Diseases

Inquire about a history of severe headaches hypertension or epilepsy and think especially of cerebral vascular accidents (subarachnoid hemorrhage cerebral thrombosis cerebral emboli) consider hypertensive encephalopathy subdural or epidural hematoma brain tumor CNS syphilis and carcinomatosis Obtain a precise description of any convulsion Before concluding that seizures have not occurred inquire using commonly understood terms like falling out blackout,  $\text{III}$  petit mal and grand mal are not terms which constitute an adequate description of a convulsion to the layman

#### 6 Circulatory System

Inquire about heart disease in particular mitral stenosis coronary artery disease aortic stenosis angina pectoris heart block (Stokes Adams) carotid sinus sensitivity arrhythmias and cardiac failure Consider shock from acute hemorrhage chronic blood loss or a blood dyscrasia such as pernicious anemia Vasodepressor syncope is of brief duration and the patient usually recovers promptly when placed horizontally

#### 7 Physical Agents

Consider heat stroke or exhaustion electric shock burns and drowning



**8 Chemical Agents**

Consider carbon monoxide industrial and agricultural poisons kerosene cleaning fluids and insect spider and reptile bites

**9 Infections**

Consider recent fevers rashes insect bites upper respiratory infection pneumonia tuberculosis severe influenza meningitis encephalitis dysentery and any infections with high fever

**10 Psychiatric Disorders**

Catatonic schizophrenia hysteria acute mania and panic states

**EXAMINATION**

Examination may be made in a matter of minutes and if necessary the observer should have 1 or more assistants Always have the patient's pulse blood pressure respirations and temperature if necessary recorded at frequent intervals and charted on a special graph

**1 Respiration**

Investigate the possibility of respiratory obstruction first If there is evidence of obstruction correct at once mouth gag oropharyngeal airway laryngoscopy and intubation or tracheotomy

A **KUSSMAUL RESPIRATION** (deep and sighing) Diabetic acidosis uræmic acidosis diarrhea salicylism and other causes of acidosis

B **INCREASED RATE** Systemic infection carbon monoxide poisoning and irritant poisons

C **DECREASED RATE** Expanding intracranial lesions alcohol opiate and barbiturate poisoning nose drops in infants electric shock kerosene poisoning

D **STERTOROUS RESPIRATIONS** Cerebral vascular accident obstruction to airway

## 2 Blood Pressure

If there is evidence of shock (decreased or undetectable blood pressure, thready pulse, pallor or sweating) start correction at once with parenteral fluids and volume expanders. Cross match blood for transfusion.

- A INCREASED Cerebral vascular accident, carbon dioxide retention, expanding intracranial lesion, uremia, eclampsia, hypertensive encephalopathy.
- B DECREASED Diabetic acidosis, shock from hemorrhage or trauma, alcoholism, opiate and barbiturate poisoning, carbon monoxide poisoning, heat exhaustion.

## 3 Pulse Rate

- A RAPID Diabetes (acidosis and hypoglycemia), alcoholism, eclampsia, hemorrhagic or neurogenic shock, coma, heat stroke, paroxysmal tachycardia.
  - B IRREGULAR Cardiac decompensation, arrhythmias, carbon monoxide poisoning.
  - C SLOW PULSE Increased intracranial pressure, heart block, opiate and barbiturate poisoning, hyperkalemia.
- After correction of respiratory obstruction and shock has been instituted, the examination can be completed.

## 4 Obvious Injury

Look carefully for local injury, e.g. scalp, tongue, chest, concealed bleeding, epilepsy, burns, asymmetry of trunk or extremities, hemiplegia.

## 5 Breath Odor

Alcohol (intoxication and trauma) - fruity or rotten apples, (diabetic acidosis) - sweetened (feto-hepatic), - urinous (uremia) illuminating gas (carbon monoxide poisoning), kerosene.

## 6 Color of Skin and Mucous Membranes

Note any trauma or bleeding, hyperemia—acute alcoholism, cherry red—carbon monoxide poisoning, cyanosis.

—respiratory obstruction or insufficiency cardiac decompensation meningitis eclampsia postictal state pneumonia methemoglobinemia pallor—shock hemorrhage anemia jaundice—hepatic coma acute surgical abdomen spiders rashes—meningococcal meningitis typhus measles bromism needle punctures—diabetes narcotic addiction

## 7 Temperature

Axillary temperatures are unreliable Mouth temperatures should not be attempted in the presence of coma Rectal temperatures should be used generally but not in pregnant or bleeding females except under direct supervision of a physician

A. **ELEVATED** Meningitis encephalitis dysentery severe general infection heat stroke hepatic coma paroxysmal tachycardia salicylism

B. **LOWERED** Carbon monoxide poisoning alcoholism barbiturate poisoning exposure

## 8 Skull Damage

Note the position and any deformities of the head assess the injury by examining scalp lesions and the extent of skull damage look for bloody or watery discharge from ears or nose but do not probe

## 9 Other Signs

A. **CONVULSIONS** Epilepsy tetany cerebral vascular accident alcoholism eclampsia CNS syphilis encephalitis meningitis hypoglycemia rapid rise of temperature in children hypertensive encephalopathy

B. **VOMITING** Increased intracranial pressure

C. **MUSCLE TITTING** Uremia poisoning

D. **ABDOMINAL MASSES** Eclampsia (pregnancy) acute surgical abdomen hepatic enlargement subcapsular rupture of liver or spleen aneurysm ascites acute urinary retention (always percuss the bladder area)

- E WOUNDS OF THE TONGUE Suggestive of preceding convulsions
- F SOFT EYEBALLS Dehydration as in diabetic acidosis

## 10 Neurologic Examination

- A MENINGEAL SIGNS Stiff neck Kernig's sign Brudzinski's sign
- B PUPILS Pinpoint dilated unequal reaction to light do not use mydriatics record pupillary size diagrammatically Note especially the dilated, fixed pupil
- C FUNDI Papilledema hemorrhage exudates
- D OCULAR AND FACIAL MUSCLES Facial weakness asymmetry corneal reflexes deviation of tongue drooling from the side of the mouth irritability of facial muscles
- E MOTOR SYSTEM Paralysis muscle tone twitchings clonus patterns of convulsions (describe in detail) respiratory paralysis
- F TENDON REFLEXES Note the activity and quality clonus abnormal reflexes
- G SENSORY SYSTEM Response to pain withdrawal thumb pressure over the exit foramina of the supraorbital nerves is a fairly accurate and consistent means of assessing levels of pain response
- H CONSCIOUSNESS AND AWARENESS Changes in level
- I INCONTINENCE OF URINE AND FECES
- J COORDINATION Note spontaneous movements
- K MAKE A DETAILED NEUROLOGIC EXAMINATION as soon as feasible (see Appendix D 3 p 79)

## 11 Laboratory Examination

- A URINALYSIS (catheterize when indicated) Complete analysis If acetone is present test for salicylates
- B BLOOD COUNTS White cell count do a differential, hemoglobin and packed cell volume if indicated
- C X RAYS
  - 1) Skull x rays—do these in cases of obvious or suspected trauma when the patient's general condition permits but it is useless to attempt them with

restless or confused patients unless they can be safely moved and held firmly

- 2) *Chest films*—should be taken in children
- 3) *Any suspicious or questionable area of the body*—but only when the patient can be safely immobilized and moved

- D BLOOD CHEMICAL DETERMINATIONS** Blood sugar if the patient is diabetic or sugar or acetone is present in the urine BUN CO in all except obvious cases bromide level when indicated STS routinely
- E BLOOD CULTURES** Should be drawn when systemic infections are suspected
- F LUMBAR PUNCTURE** Should be considered only after evaluation of other evidence Cells protein STS culture and sugar if indicated *Do not do a lumbar puncture in the presence of increased intracranial pressure papilledema or an obviously expanding intracranial lesion*
- G GASTRIC LAVAGE** This is dangerous in the presence of deep coma but not gastric aspiration if acute gastric dilatation is suspected
- H ELECTROENCEPHALOGRAMS** These are not usually helpful in emergencies

## 12 Psychiatric Examination

When the preceding examinations have yielded no other likely etiology psychiatric evaluation may be conducted along the lines previously indicated (see Appendix D 6 p 97) It is of great help to the psychiatrist to keep the informants present until he has had a chance to interview them

PART II

Laboratory Procedures and  
Examinations



# 1 Hematologic Procedures

## COLLECTION OF BLOOD

### 1 Capillary Blood

This is obtained by puncture of the skin with a sterile new or autoclaved lancet. The instrument must not be reused on another patient unless it is first reautoclaved for fear of transmitting the virus of homologous serum hepatitis. Sterilization by boiling is not adequate.

### 2 Blood from a Large Vessel

This blood (ordinarily taken from a vein) should be obtained as nearly as possible without stasis in order to avoid alteration of concentration of formed elements. The puncture should be clean since lack of free flow and introduction of air bubbles may adversely affect the determination of erythrocyte number, packed cell volume, sedimentation rate, and clotting factors due to hemolysis and/or partial coagulation. The blood should be transferred with a minimum of delay to the appropriate container after first removing the needle to minimize hemolysis. If however a smear is to be made, this is first prepared from a drop of blood from the needle or syringe tip before transfer of the contents of the syringe. Bottles containing anticoagulant should be shaken at once. When blood from an anticoagulant bottle is used, a uniform suspension of cells must be assured by inverting the bottle at least 50 times followed by prompt removal of the sample.

### 3 Anticoagulants

Anticoagulants used for hematologic studies are Sequestrene sodium, the double oxalate mixture of Heller and Paul, and



heparin. Sequestrene sodium which is a chelating agent binding ionized calcium is satisfactory for most routine purposes. The optimum quantity for preventing coagulation of 5 ml of blood is 5 mg but this will prevent coagulation of quantities of blood from 1 to 8 ml without altering packed cell volume or affecting sedimentation rate. Sequestrene dipotassium is more soluble but produces shrinking of red cells.

Heparin solution may be used occasionally for special studies but it is not used routinely because in the concentration necessary for complete and prolonged anticoagulation it favors the agglomeration of large rouleaux and thus may spuriously augment sedimentation rate. Clumping of leukocytes and red blood cells may interfere with their enumeration but it does not affect the determination of packed cell volume.

The double oxalate mixture (potassium oxalate 4 mg ammonium oxalate 6 mg for 5 ml of blood) is entirely satisfactory for most purposes. Alterations in this proportion or single oxalate salts may produce drastic alterations in the red cell volume.

Morphologic distortion of leukocytes may result from any of the anticoagulants particularly oxalates so that smears for morphologic study must be made from fresh blood without the addition of anticoagulants.

## VOLUME OF PACKED RED CELLS ( $V_c$ )

Two techniques are commonly available for this determination—the macrotechnique using the Wintrobe hematocrit and a microtechnique using capillary tubes. Hematocrits of different design are used in some institutions but the principles involved are similar to those of the Wintrobe tube. The micro method has a slightly greater range of error and can be performed only in a special centrifuge designed for capillary tubes. It is useful as a screening procedure for anemia since capillary blood may be used.

The *macro method* is performed by filling the Wintrobe hematocrit precisely to the 101 mark with blood from an anticoagulant bottle. This will bring the bottom of the meniscus to the 10 mark. The tube is then balanced and centrifuged for

at least 30 minutes. For maximum packing the centrifuge must provide a relative centrifugal force of  $2260 \times G$ . This may be achieved in most large floor centrifuges or at the highest rheostat setting in certain table centrifuges.

After centrifugation read the volume of packed red cells ( $V_c$ ) to the nearest 0.1 mm. In angle head centrifuges the upper level of the red cell column will slope; the reading is made midway on the slope.

In addition to the volume of packed red cells it is possible to estimate roughly the volume of packed leukocytes and platelets and the icterus index of the plasma with the Wintrobe tube. Better separation of leukocytes and platelets in the hematocrit will be obtained if the blood is allowed to sediment for an hour and is centrifuged at low speed for 10 minutes before full speed centrifugation.

## HEMOGLOBIN

The only reasonably accurate method for routine use is the photometric estimation of the optical density of a solution of oxyhemoglobin ( $HbO$ ) or better still a derivative such as cyanmethemoglobin ( $MHbCN$ ) or alkaline hematin. The accuracy of such techniques is usually better than 5%. Visual colorimetry employing the less stable and somewhat cloudy solution of acid hematin is still in general use; in experienced hands its potential inaccuracy is 2 to 3 times that of good photometric techniques.

### 1 Photometric Determination of Hemoglobin as Cyanmethemoglobin

An accurately measured volume of blood is diluted in an accurately measured volume of solution that will convert hemoglobin to cyanmethemoglobin. The optical density of this solution is compared with that of a known standard in a photoelectric colorimeter. The diluent solution contains potassium cyanide, potassium ferricyanide, and sodium bicarbonate. For most colorimeters 20 cu mm of blood is diluted in 5 ml of solution and read after at least 10 minutes have elapsed to allow for conversion of all hemo-

*globin to cyanmethemoglobin* The advantage of this method over other photoelectric methods is that cyanmethemoglobin is a very stable pigment and standard solutions are available from outside sources so that a single standard may be used for different instruments and in different institutions

## 2 Visual Colorimetric Determination of Hemoglobin as Acid Hematin (Sahli Method)

This is a commonly used method in laboratories where the number of hemoglobin determinations is insufficient to warrant the purchase of a photoelectric colorimeter

- A Fill the calibrated tube approximately to the 2 Gm mark with 0.1 N HCl using a dropper
- B Fill the pipette accurately to the 0.02 ml mark with blood from a cutaneous puncture or anticoagulant bottle (The use and care of the Sahli pipette is the same as described below for hemocytometer and pipettes)
- C Wipe off blood adhering to the outside of the pipette
- D Expel the blood into the acid in the tube This must be done slowly with gentle agitation of the tube avoid forming bubbles The pipette is then rinsed 3 times by slowly drawing in and discharging acid from the tube
- E Mix the contents of the tube with a stirring rod
- F Allow the tube to stand The development of color is gradual and becomes asymptotic reaching 95% of maximum in about 10 minutes 98% in about 20 minutes For this reason a standard time should be selected Twenty minutes is often too long for practical purposes so that 10 minutes may be used if the instrument is standardized for this interval
- G Dilute the hematin solution by adding distilled water 1 drop at a time and mixing with the stirring rod until the color matches that of the brown glass The light source should be constant daylight is best but since this is not always available the usual procedure is to use a blue filtered substage lamp
- H When the color matches read the hemoglobin concentration on the side of the tube in grams per 100 ml of blood Ignore the calibration in per cent

- I The instrument should be standardized periodically against a standardized photoelectric colorimeter

## ERYTHROCYTE AND LEUKOCYTE COUNTS

### 1 Core ■ Hemocytometer and Pipettes

The hemocytometer and its special optically plane cover glass must be cleaned with soap and water and thoroughly rinsed and dried before use. Care should be taken to avoid scratching their surfaces. Lint on the inferior surface of the cover slip or on the supporting shoulders of the hemocytometer will introduce error by increasing the volume of blood to be examined. Lint and grease will interfere with the dispersion of blood cells. Ordinary coverglass may not be used as hemocytometer covers.

Pipettes must be filled accurately with blood to the proper mark. If the blood column rises to no more than 2 mm above the mark it may be drawn down to the mark by lightly touching the pipette tip to the finger. If the sample rises to more than 2 mm above the mark the pipette must be cleaned and the procedure begun anew.

The hemocytometer is filled by capillary attraction of diluted blood from the pipette tip held at the edge of the chamber. Slight overflow into the trenches may be immediately corrected by touching the edge of the chamber with gauze or filter paper. If there is more than slight overflow the chamber and cover slip must be cleaned and dried and the filling begun anew.

A systematic technique of counting cells as outlined in handbooks of laboratory procedures should be followed in order to avoid duplications and omissions.

Pipettes are cleaned by sucking out the diluted blood and rinsing through 3 times with distilled water. They are then dried with acetone or with alcohol and ether. Occasionally an accumulated film of precipitated protein or grease should be removed by filling the pipette with acid cleaning fluid and permitting it to stand overnight. The mixing bead rolls freely in a clean dry pipette. A pipette with a chipped tip is potentially inaccurate and should be discarded.

## 2 Red Blood Cell Count

In the most experienced hands using 2 pipettes and 2 chambers it is difficult to perform an erythrocyte count with accuracy greater than  $\pm 10\%$ . For this reason erythrocyte counts are not used routinely to determine the presence of anemia; their principal usefulness is in the determination of red cell indices and calculation of the absolute numbers of reticulocytes and other formed elements which are enumerated in relation to the number of red cells.

- A Draw blood from a cutaneous puncture or anticoagulant bottle to the 0.5 mark of the red cell pipette.
- B Wipe off blood adhering to the outside of the pipette.
- C Draw in diluting fluid (Gower's solution—12.5 Gm of sodium sulfate and 33.3 ml of glacial acetic acid dissolved in 200 ml of water) to the 101 mark rotating the pipette gently during this process. Air must not be trapped in the bulb as filling nears completion.
- D Prepare hemocytometer and cover for receiving blood (This may of course be done before Step A.)
- E Shake the pipette for 3 minutes.
- F Immediately expel at least 4 drops from the pipette to discard the fluid in the capillary portion which should contain no cells and does not participate in the dilution.
- G Fill both sides of the hemocytometer and allow to stand until settling of cells is complete (about 3 minutes).
- H With the high dry lens of the microscope count all cells in 5 of the smaller squares comprising the central large square of the total ruled area (viz. the 4 corner and 1 middle square—a total of 80 of the smallest squares). Repeat on the other side of the chamber.
- I Divide the number of cells counted by 200. This is the red cell count in millions per cu. mm.

## 3 Calculation of Erythrocyte Indices

- A Mean Corpuscular Volume (MCV) The average volume of each red blood cell

$$\text{MCV in } \mu \text{ (cubic microns)} = \frac{\text{Vc (\%)} \times 10}{\text{RBC (mil/mm)}} \quad \text{}$$

- B Mean Corpuscular Hemoglobin Concentration (MCHC) The proportion of hemoglobin present in the average cell

$$\text{MCHC in } \% = \frac{\text{Hgb (Gm /100 ml blood)} \times 10}{V_c (\%)}$$

- C Mean Corpuscular Hemoglobin (MCH) The average weight of hemoglobin in each cell

$$\text{MCH in } \mu\text{g (Micromicrograms)} = \frac{\text{Hgb (Gm /100 ml blood)} \times 10}{\text{RBC (ml /mm )}}$$

#### 4 White Blood Cell Count

With careful technique leukocyte counts performed as described below have a probable error of from  $\pm 10\%$  to  $\pm 20\%$ . This is sufficient for most clinical purposes. Some what greater accuracy can be achieved by using 2 pipettes and/or 2 chambers.

- A Draw blood from a cutaneous puncture or anticoagulant bottle to the 0.5 mark of the white cell pipette
- B Wipe off blood adhering to the outside of the pipette
- C Draw diluting fluid (3 parts acetic acid in 100 parts of water) up to the 11 mark using the same precautions indicated in the procedure for dilution of red blood cells
- D Prepare the hemocytometer and cover slip (This may of course be done before Step A)
- E Shake the pipette for 3 minutes
- F Discard the first 4 drops from the pipette
- G Fill 1 side of the hemocytometer and allow to stand until settling is complete (approximately 2 minutes)
- H With the low power lens of the microscope count all cells in the corner 4 of the 9 largest squares
- I Multiply the number of cells counted by 50. This is the nucleated blood cell count per cu mm of blood. If no nucleated red blood cells are present this figure is reported as the white cell count. If nucleated red blood cells are present the correction described below is applied.

#### 5 Estimation of Nucleated Red Blood Cells

The absolute number of nucleated red blood cells is determined by applying the following formula based on the

number of nucleated red blood cells per 100 white blood cells ■ determined on examination of the stained smear  
 Nucl d RBC/mm<sup>3</sup> —

$$\text{Nucl d cells/mm} \times \frac{\text{Nucl d RBC/100 WBC}}{100 + \text{nucl d RBC/100 WBC}}$$

The absolute number of nucleated red blood cells is subtracted from the total nucleated cell count to give the white blood cell count

## THE STAINED DRY BLOOD SMEAR

### 1 General

Smears are made from fresh uncoagulated blood to which anticoagulants have not been added. Cover slips and slides even new ones must be cleaned by washing with soap and water, soaking in alcohol and polishing with a grease free cloth. They should be removed from their containers with forceps and may be handled with the fingers only by the corners and edges.

### 2 Preparation of Dried Film

**A COVER SLIP PREPARATION** This technique is recommended since it allows more random distribution of leukocytes.

- 1) Touch the middle of the cover slip held horizontally by 2 adjacent corners between thumb and forefinger to a 2-3 ml drop of blood at a cutaneous puncture site (without touching the skin) or at a needle tip.
- 2) Drop onto this another cover slip held so that the edges of 1 correspond in position to the corners of the other.
- 3) Just before the resultant spreading of the blood is complete, quickly pull the cover glasses apart while keeping them in the same plane.
- 4) Permit the 2 films to dry in air.

**II SLIDE PREPARATION** This technique tends to push larger leukocytes to the edges of the smear, thus altering their distribution.

- 1) Place 2 small drops of blood near the end of a 1 × 3 in. clean glass slide.
- 2) Touch a second glass slide to the first at an angle of

approximately 30 degrees, so that the blood is in the acute angle.

- 3) Draw the second slide back along the first until the edge touches the blood. Immediately advance the second slide drawing the film of blood behind it in the acute angle.
- 4) Permit the resulting film to dry in air.

### 3 Technique of Staining

- A. Place the cover slip or slide on a staining rack, film side up.
- B. Flood the top surface with 16 ml. of a mixture of acidophilic pink and basophilic blue dyes in absolute methanol, taking care to avoid overflow.
- C. Allow stain to remain 1-2 minutes to fix the film on the cover slip.
- D. Dilute the stain with distilled water or special buffer solution in an amount approximately equal, drop for drop, to that of the stain, taking care to avoid overflow. A greenish scum should appear on the surface.
- E. Allow to stand several minutes, depending on the characteristics of the stain and diluent during this period staining takes place.
- F. Wash the smear gently with water until all traces of bound stain are gone.
- G. Blot with filter paper and permit to dry in air.
- H. Mount cover slip smear on a glass slide film side down, with Canada balsam or other permanent mounting agent. Mineral or immersion oil may be used for temporary preparations.

### 4 Examination

- A. QUALITATIVE APPRAISAL. A good smear should have at least 8 low power fields in which the red cells just touch but do not overlap. Suitable areas are examined systematically under oil immersion, a routine procedure being followed in which appearance of red cells, white cells, and platelets is described. In cover slip preparations, if the concentration of platelets is diminished or



number of nucleated red blood cells per 100 white blood cells as determined on examination of the stained smear

$\text{Nucl d RBC/mm}^3 =$

$$\text{Nucl d cells/mm} \times \frac{\text{Nucl d RBC/100 WBC}}{100 + \text{nucl d RBC/100 WBC}}$$

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- 4) Permit the resulting film to dry in air.

### 3 Technique of Staining

- A Place the cover slip or slide on a staining rack film side up.
- B Flood the top surface with *H&E stain* (a mixture of acidophilic pink and basophilic blue dyes in absolute methanol) taking care to avoid overflow.
- C Allow stain to remain 1-2 minutes to fix the film on the cover slip.
- D Dilute the stain with distilled water or special buffer solution in an amount approximately equal drop for drop to that of the stain taking care to avoid overflow. A greenish scum should appear on the surface.
- E Allow to stand several minutes depending on the characteristics of the stain and diluent during this period staining takes place.
- F Wash the smear gently with water until all traces of liquid stain are gone.
- G Blot with filter paper and permit it to dry in air.
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if they are not present on 1 cover slip the mate should be examined

- B DIFFERENTIAL NUCLEATED CELL COUNT** The smear is scanned in a systematic manner using the oil immersion lens and the total number of each type of white blood cell present in 200 leukocytes is determined. Nucleated red blood cells are counted in addition to the 200 leukocytes and their absolute number per cu mm is later calculated as described on page 120 (5 I)

## ESTIMATION OF SICKLE CELLS

### 1 Principle

If type S hemoglobin forms more than 10 to 20% of the hemoglobin present in the red cells the physical alteration it undergoes when it is in a reduced (unoxxygenated) state produces distortion of the film membrane so that the cells appear crescentic elongated or sickle shaped

### 2 Technique

- A** Place 1 drop of blood and 2 drops of fresh 2% sodium bisulfite solution on a clean slide and mix by gentle rotation for about 15 seconds (The sodium bisulfite solution will remain active for 1 week if kept stoppered and refrigerated )
- B** Drop a cover slip over the mixture press down gently to make a thin film and seal edges with petroleum jelly to prevent drying
- C** Allow to stand 30 minutes at room temperature and examine for sickle cells. Report as positive if more than 10% of the cells are sickled

## THE RETICULOCYTE COUNT

### 1 Principle

Ribonucleic acid present in immature red blood cells (giving a polychromatophilic appearance in Wright's stained smears) is precipitated into a blue reticulum with certain dyes when mixed with wet blood

### 2 Technique

- A METHOD OF BRECHER** Draw approximately equal por

tions of blood and reticulocyte diluting fluid (new methylene blue C I 927 0.5 Gm potassium oxalate 1.6 Gm distilled water to 100 ml ) into a hemoglobin pipette expel mix and refill the pipette with the mixture Allow to stand 8 to 10 minutes blow out 2 to 3 drops on the end of the glass slide make smear and allow to dry

- B **WET METHOD** Reticulocytes may also be identified and enumerated in a wet preparation stained with brilliant cresyl blue as described under platelet counting below
- C With the oil immersion lens count the number of reticulocytes in 1 000 red blood cells Express results as reticulocytes per 100 RBC
- D Do a red blood cell count
- E Multiply the number of red cells per cu mm by the percentage of reticulocytes and report as reticulocytes per cu mm

## THE PLATELET COUNT

### 1 Direct Methods

Blood is diluted in a red cell pipette with a freshly filtered solution of special platelet diluting fluids Platelets are counted directly in the counting chamber by direct or phase microscopy

### 2 Indirect Method (modified Dameshek Technique)

- A Place 1 drop of fresh blood and 2 drops of brilliant cresyl blue solution (1 Gm brilliant cresyl blue 0.85 Gm sodium chloride and 0.4 Gm sodium citrate made up to 100 ml with distilled water) on a clean glass slide and mix by gentle rotation for about 15 seconds
- B Drop a cover slip over the mixture press gently to make a thin film seal the edges with petroleum jelly
- C Allow to stand 5 to 10 minutes
- D With the oil immersion lens count the number of platelets per 500 red blood cells Express results in platelets per 100 red blood cells
- E Do a red blood cell count

if they are not present on 1 cover slip the mate should be examined

- B **DIFFERENTIAL NUCLEATED CELL COUNT** The smear is scanned in a systematic manner using the oil immersion lens and the total number of each type of white blood cell present in 200 leukocytes is determined. Nucleated red blood cells are counted in addition to the 200 leukocytes and their absolute number per cu mm is later calculated as described on page 120 (5 I)

## ESTIMATION OF SICKLE CELLS

### 1 Principle

If type B hemoglobin forms more than 10 to 20% of the hemoglobin present in the red cells the physical alteration it undergoes when it is in a reduced (unoxxygenated) state produces distortion of the film membrane so that the cells appear crescentic elongated or sickle shaped

### 2 Technique

- A Place 1 drop of blood and 2 drops of fresh 2% sodium bisulfite solution on a clean slide and mix by gentle rotation for about 15 seconds (The sodium bisulfite solution will remain active for 1 week if kept stoppered and refrigerated)
- B Drop a cover slip over the mixture press down gently to make a thin film and seal edges with petroleum jelly to prevent drying
- C Allow to stand 30 minutes at room temperature and examine for sickle cells Report as positive if more than 10% of the cells are sickled

## THE RETICULOCYTE COUNT

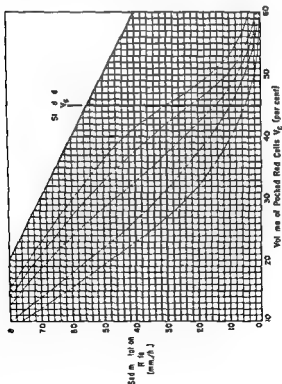
### 1 Principle

Ribonucleic acid present in immature red blood cells (giving a polychromatophilic appearance in Wright's stained smears) is precipitated into a blue reticulum with certain dyes when mixed with wet blood

### 2 Technique

- A **METHOD OF BRECHER** Draw approximately equal por

- 6 On the Hynes Whitby modification of the Wintrobe Landsberg correction graph locate the junction of the columns of *Observed Sedimentation Rate* and *Volume of Packed Red Cells*. This figure is the *Corrected Sedimentation Rate* representing that which would be observed if the subject's volume of packed red cells were 45%.
- 7 In view of the disputed validity of the foregoing correction of sedimentation rate report each observation that was made
- (1) The observed sedimentation rate
  - (2) The volume of packed red cells
  - (3) The corrected sedimentation rate



F Multiply the number of red blood cells per cu mm by the number of platelets per 100 red cells and report the product as platelets per cu mm of blood

### 3 Critique

Platelet counting methods have a much larger inherent error than erythrocyte or leukocyte counting methods and are useful only in experienced hands. For most clinical purposes sufficient information can be obtained by examination of a stained smear. If platelets can be found without difficulty they are not significantly reduced in number and can be reported as decreased, apparently normal, or increased. In addition, a clot can be observed for retraction; if retraction occurs, platelets may be assumed to be present in adequate numbers.

## ERYTHROCYTE SEDIMENTATION RATE— WINTROBE LANDSBERG TECHNIQUE

- 1 Remove blood from a vessel without such difficulty as might lead to partial clotting or hemolysis. Transfer the appropriate quantity at once to a bottle containing Sequestrene sodium. Mix promptly.
  - A If sickle cells are present they will retard the sedimentation rate and therefore should be converted to nonsickled forms through complete oxygenation of the hemoglobin. This is accomplished by running a stream of oxygen from a cylinder into a bottle, quickly corking and slowly rotating the bottle around its longitudinal axis for 5 to 10 minutes until the blood is bright red.
- 2 Within 90 minutes of the removal of blood fill a Wintrobe hematocrit as described for the determination of volume of packed red cells. Note the exact time ( 0 time )
- 3 Place the hematocrit in a special rack in an exactly vertical position (even imperceptible deviation from the vertical will allow more rapid sedimentation)
- 4 At the end of precisely 1 hour note the millimeters of settling of the topmost red cell layer (read from the top of the tube). This is the *Observed Sedimentation Rate*
- 5 Centrifuge the hematocrit as described to determine the *Volume of Packed Red Cells (Vc)* in millimeters (Read from the bottom of the tube )

- B Pour off serum and break up the clot by forcing it through a fine screen into a small beaker
- C Transfer the disrupted clot to a test tube and concentrate leukocytes by centrifugation
- D Make smears of the buffy coat layer and stain with Wright's stain
- E Examine with the oil immersion lens of the microscope. The I.E. cells appear to be neutrophils in which the nucleus is pushed to one side and the cytoplasm is filled with a reddish brown or purple homogeneous mass

## TESTS FOR ABNORMAL SERUM PROTEINS

### 1 Cryoglobulins

- A **PRINCIPLE** Abnormal proteins which precipitate at low temperatures (5 to 30 C) are occasionally found in patients with multiple myeloma and rarely with chronic lymphocytic leukemia and certain other conditions. They may be associated with Raynaud's phenomena.
- B **TECHNIQUE** With the patient fasting draw approximately 10 ml of blood and allow to clot keeping it at 37 C. Centrifuge, remove the serum and place in a test tube in the refrigerator (5 C). Examine in 30 minutes for precipitate. If none is seen keep in the refrigerator up to 6 days.

If a precipitate should form remove the tube from the refrigerator and rewarm to 37 C. True cryoglobulins will redissolve precipitated fibrin will not.

### 2 Macroglobulins (Sia Water Test)

- A **PRINCIPLE** In some patients with hyperglobulinemia a precipitate forms on addition of a drop of serum to distilled water. Macroglobulins settle rapidly to the bottom. Such a finding suggests the diagnosis of macroglobulinemia of Waldenström but other studies are required for its proof. A negative result does not disprove the diagnosis.
- B **TECHNIQUE** To an approximately 10 in. column of distilled water (in a graduated cylinder or large test



## QUALITATIVE TEST FOR OSMOTIC FRAGILITY OF RED BLOOD CELLS

### 1 Principle

The red blood cells of subjects with microspherocytosis are more susceptible to bursting through imbibition of water in hypotonic saline solution than are normal red blood cells

### 2 Technique (Screening Test)

- A Prepare 1 bottle containing Sequestrene sodium with blood from the subject to be tested and 1 with blood from a normal person. Exercise particular care to avoid hemolysis (e.g. avoid wet syringes)
- B Place 0.1 ml. of blood from the test subject in each of a pair of test tubes and the same amount of control blood in each of another pair
- C Add 1 ml. of 0.85% sodium chloride solution to 1 tube of each of a pair of test tubes and the same amount of control blood in each of another pair
- D Mix each tube thoroughly and centrifuge all 4. The presence of hemoglobin in the supernatant of the 0.85% saline tube of the test subject probably indicates increased osmotic fragility. The supernatant of the other 3 tubes should be colorless.
- E If the result is positive a more elaborate test determining the amount of hemolysis at varying concentrations of saline before and after incubation is necessary

## TEST FOR LE PHENOMENON

### 1 Principle

In patients with disseminated lupus erythematosus a globulin is often present which when brought into contact with leukocytes causes lysis of nuclear material and subsequent phagocytosis by other cells

### 2 Technique

- A Remove 5 ml. of blood from a large vessel transfer to a test tube allow to clot and incubate for 2 hours

## 2 Bleeding Time

- A Place a blood pressure cuff around the upper arm and inflate to 40 mm Hg
- B With a lancet make a puncture wound approximately 2 mm deep in an avascular area on the anterior aspect of the forearm (Ivy method) or in a finger tip (Duke method) If the patient may have a hemorrhagic diathesis do not use an ear lobe
- C Touch the escaping blood with a piece of filter paper every 30 seconds taking care not to touch or massage the wound
- D When blood stops oozing from the wound report the time elapsed from the time puncture was made to the nearest half minute
- E If blood fails to stop oozing after 15 minutes discontinue and report the time as greater than 15 minutes

## 3 Detection of Capillary Fragility (Tourniquet Test Rumpel-Leede Phenomenon)

- A Note the presence on the hand and forearm of petechiae, nevi, hemangiomas or other marks which might subsequently be confused with fresh petechiae
- B Place a blood pressure cuff on the upper arm and inflate to 70-80 mm Hg or just at or below diastolic pressure Allow to remain 7 minutes
- C Remove the cuff and wait 5 minutes
- D Examine the forearm particularly the wrist and back of the hand for petechiae which have appeared petechiae may normally appear just below the cuff Describe the appearance and distribution of petechiae and record their occurrence as rare or numerous
- E Re-examine and describe the findings after 30 minutes to 1 hour

## PROTHROMBIN TIME

### 1 Critique of Method

Although the determination of "prothrombin time" does not measure prothrombin concentration it affords a good

tube) add 1 drop of serum. Observe whether any cloudiness or flocculation occurs and whether it remains suspended or falls promptly to the bottom. Describe the result.

## EXAMINATIONS CONCERNED WITH HEMOSTASIS

### 1 Coagulation Time and Observation of Clot Retraction and Fibrinolytic Activity

#### A COAGULATION TIME (MODIFIED LEE WHITE METHOD)

- 1) Perform a venipuncture with a sterile 5 ml syringe and needle. Note the time when blood first enters the syringe ( 0 time).
- 2) Draw 5 ml of blood, remove needle and gently expel 1 ml into each of 2 clean 13 × 100 mm test tubes which have been rinsed with saline.
- 3) Place the tubes in a rack at room temperature and tilt 1 of the tubes at 30 second intervals until it can be inverted without spilling blood.
- 4) Now continue the same procedure with the other tube until the same end point is reached. Coagulation time is the difference in minutes between the time the blood enters the syringe and the time the second tube can be inverted without spilling.

#### B OBSERVATION OF CLOT RETRACTION

- 1) After Step 4 has been completed, separate the clot in 1 of the tubes from the glass by gently running with an applicator stick.
- 2) Observe the tube at hourly intervals to detect contraction in the size of the clot with expression of serum.
- 3) The time in hours for beginning clot retraction is noted. The ability of the clot to retract is almost entirely dependent on the presence of adequate platelets.

#### C OBSERVATION OF FIBRINOLYTIC ACTIVITY

- 1) Following Step 4, observe the undisturbed tube for dissolution of the clot at 30 and 60 minutes and 2, 3, 4 and 24 hours.

lignancy Gaucher's disease certain megaloblastic anemias and aleukemic leukemia

- B For investigation of anemia leukopenia and thrombocytopenia of unknown cause
- C For culture
- D For estimation of tissue iron stores

## 2 Limitations

- A It is of little or no value in most common forms of anemia hemolytic disease polycythemia chronic leukemias and lymphoma and in patients whose illnesses have not been clarified by other diagnostic procedures but who lack the indications noted above
- B It does not provide reliable information about cellularity or architecture since dilution of the sample to an unknown degree with blood is inevitable Therefore hypoplastic anemia myelofibrosis marrow hyperplasia etc. cannot be diagnosed by this method histologic examination of surgically removed marrow is required

## 3 Site of Aspiration

- A **STERNUM** Gives highest percentage of satisfactory samples in adults but has some psychologic disadvantage in apprehensive patients Penetration of sternum can result in serious or fatal injury Aspiration should be done in the midline of the manubrium below the angle of Louis (junction of second rib) not below the junction of the third rib
- B **ILIUM** Does not have psychologic disadvantage or danger and is only slightly less likely to yield a satisfactory sample than sternal aspiration To aspirate the *anterior ilium* use a Turkel or similar marrow needle with the patient supine enter the marrow cavity 1 to 2 cm below the crest and 2 to 5 cm behind the anterior superior iliac spine with the needle pointing medially and slightly cephalad Penetration of the fascia lata is felt before the bone is reached

The *posterior ilium* contains a larger marrow cavity and satisfactory marrow samples in larger volume may

means of evaluating the coagulability of blood when prothrombin is reduced as in patients with liver disease or under therapy with bishydroxycoumarin. Results are reported as clotting time in seconds and as percent. The latter is an abstract concept of little usefulness. Clotting time is valid only when the control prothrombin time is normal. In these circumstances a prothrombin time of 22-32 seconds is sought in patients receiving bishydroxycoumarin.

## 2 Technique

- A. Under precautions that no alcohol enter the needle make a clean puncture of a large vessel and draw at least 4-5 ml of blood into a syringe.
- B. Without delay introduce blood to exactly the 5 ml mark into a specially prepared marked stoppered centrifuge tube containing 0.5 ml of 0.1 M sodium oxalate. Mix the contents of the tube promptly by inversion.
- C. Add 0.1 ml of brain thromboplastin suspension allow to incubate at 37 C for a few seconds and then add 0.1 ml of 0.02 M CaCl<sub>2</sub> simultaneously, starting a stop watch. The clotting times of the test and control plasmas are reported.

## 3 Interpretation

The 1 stage prothrombin time will be prolonged in deficiencies of any of the following factors: Prothrombin, Factor V, Stuart PPCA or Hageman. Differences in prothrombin times are of greatest significance in the 15-35 second range; differences between 2 very long or 2 very short times have less significance.

## BONE MARROW ASPIRATION

### 1 Indications

- A. For diagnosis of hematologic disorders by study of cell morphology when diagnostic cells are not ordinarily found in blood e.g. multiple myeloma, metastatic ma-

tissue for histologic section or for centrifugation to obtain buffy coat smears

On aspiration of the sternal marrow cavity a severe aching pain is felt by most patients and is a good sign that the needle is properly placed. This symptom is less frequently observed on aspiration at other sites.

The needle is then withdrawn and a small sterile dressing is applied to the puncture site. If little or no material could be obtained on aspiration any material in the lumen of the needle should be expressed with the stylet and smears made.

## 5 Examination of Smears

- A. Smears are stained with Wright's stain or special stains for certain purposes (e.g. Prussian blue for stainable iron). Cellular preparations may require longer times for fixing and staining with Wright's stain than blood smears but are otherwise handled in a similar fashion.
- B. Examine smears first under low power (a) to find suitable areas for examination with oil immersion objective (b) to locate megakaryocytes and other large cells or nests of malignant cells.
- C. With the oil immersion objective detailed morphology of abnormal cells may be studied. A differential count and myeloid erythroid (M:E) ratio may be estimated counting 300 to 500 consecutive cells. Normal values for these are given in the table which follows.

## OTHER STUDIES

Such studies as determination of serum iron or clotting factors not described above, hemoglobin electrophoresis etc. usually are carried out after arrangement with the Hematology or Coagulation Laboratory.

## AVERAGE NORMAL HEMATOLOGIC AND BONE MARROW VALUES

The following tables indicate the range of average normal values in different age groups.

also be obtained from this site. A Vim Silverman or a similar needle is commonly used in this site.

- C **SPINOUS PROCESS OF LUMBAR VERTEBRA** May be used with the patient sitting or prone. Entry is made directly into the end of the process in the midline.
- D **TIBIA** Satisfactory in small children or infants after 4-5 years of age the cortex becomes too thick and cellular marrow is not regularly found at this site. Entry is made just below the tubercle anteriorly or medially.

#### 4 Technique

The site selected should be prepared and draped as for a surgical procedure. The operator should scrub and wear sterile gloves. The skin, subcutaneous tissue and periosteum should be infiltrated with procaine. A small ( $\frac{1}{8}$  in.) incision in the skin facilitates penetration of the needle.

A commonly used needle is the Turkel which consists of an outer short needle with its stylet and a longer inner needle with a saw-toothed tip and its stylet. This needle is satisfactory for the sternum, anterior iliac crest, spinous process or tibia. Longer needles of different design may be helpful in iliac crest punctures in obese patients but are likely to produce greater dilution of the sample.

The outer Turkel (or other needle) with stylet in place is pushed to the periosteum and then through the cortex with a rotating boring motion. A give is usually felt as the sternal marrow cavity is entered; this is less frequently noted at other sites. The inner saw-toothed Turkel needle may be used to facilitate penetration of the cortex or to obtain a piece of marrow tissue for histologic section or imprints.

After the marrow cavity is entered the stylet is removed and a sterile 5 ml. syringe attached to the needle. Gentle but firm suction is then applied until the first drop of marrow blood appears. At this point the syringe is removed and passed to an assistant who prepares smears. A second syringe moistened with heparin is then attached and up to 1 ml. of material is aspirated from the marrow cavity; this may be used to culture to obtain particles of marrow.

# AVERAGE NORMAL HEMATOLOGIC VALUES (cont.)

3 Platelets		DIRECT METHOD	INDIRECT METHOD
Plat let count (thousands/cu mm)		300 ± 150	600 ± 300
4 Bleeding and Clotting Factors			
Co gulation time (minutes)			10 ± 5
Clot retraction			Present by 1 hour
Bleeding time (minutes)			3 ± 2
Capillary fragility			No petechiae on wrist or hand
Fibrinogen time (seconds) (Quick)			13 ± 1
Partial thromboplastin time (seconds)			<20% residual at 1 hour
Prothrombin utilization			300 ± 100
Fibrinogen (Gm /100 cc)			None in 24 hours
Fibrinolysis			60-90
Partial thromboplastin time (seconds)			<10
Miscellaneous			125 ± 75
Corrected sedimentation rate (mm /hr ) (Vc ~ 45%)			350 ± 150
Serum iron (micrograms/100 cc)			
Total iron binding capacity (micrograms/100 cc)			



# AVERAGE NORMAL HEMATOLOGIC VALUES

## 1 Red Blood Cells

	BIRTH	3 Mo	6 Mo - 1 Yr	4 Yr *	M	ADULT
Volume of packed red cells (%)	54	36	35.5	37	47 ± 70	42 ± 50
Hemoglobin (Gm/100 cc)	17.6	11.4	11.8	13.1	15 ± 30	13 ± 25
Fetal Hgb (% of total)	70 ± 15	25 ± 15	3(1.25)	<2		
Erythrocyte count (millions/cu mm)	5.1	4.3	4.6	4.6	5.7 ± 0.8	4.8 ± 0.6
Reticulocytes (thousands/cu mm)	100	20	40	50		
Nucleated RBC (thousands/cu mm)	2 ± 1	0	0	0		
MCV (cu microns)	106	80	77	80		
MCHG (%)	46	34	33	34		
MCH (micromicrograms)	38	27	26	27		
Osmotic fragility		No hemolysis in 0.50% sodium chloride solution				

## 2 White Blood Cells

	BIRTH	3 Mo	2 Yr	4 Yr *	ADULT
Leukocyte count (per cu mm)	15,000	21,000	11,000	8,000	7,500 ± 3,000
Metamyelocytes (juveniles and bands)		1,000			300 ± 150
Segmented neutrophils	6,500	12,000	4,000	4,000	4,500 ± 1,500
Eosinophils	500	500	400		250 ± 150
Basophils		60	60		30 ± 15
Lymphocytes†	4,500	4,500	6,000	3,000	2,100 ± 700
Monocytes	2,000	3,000	800	600	400 ± 200
Immature leukocytes	1,500	1,000	100	0	

† Not normal in the first 3 months of life; gradually decreases to normal by 1 year of age.

## 2 Urine

### ROUTINE OR BASIC EXAMINATION

#### 1 Appearance

Color and degree of turbidity are recorded

#### 2 The pH

This is determined with nitrazine paper. For the determination to be meaningful the specimen must be fresh because the pH rises as urine stands.

#### 3 Specific Gravity

The urinometer should be read at the level of the bottom of the meniscus. The accuracy of the instrument should be checked with water first.

#### 4 Protein

**A. HEAT AND ACETIC ACID TEST** If the specimen is cloudy it is preferable to use the supernatant fluid after centrifugation. Fill a test tube two thirds full of urine. Holding the test tube by the bottom rotate the upper end in an open flame thus bringing the upper layer of urine to a boil. Add 3 drops of 5% acetic acid and reheat. The persistence of a cloudy precipitate after the addition of acid indicates the presence of protein.

An alkaline urine may give a cloud on heating due to the precipitation of phosphates but this will dissolve on addition of acid. An excessive amount of acid also may redissolve the albumin. The appearance of a cloud which fades on further heating is suggestive of Bence Jones protein.

## AVERAGE NORMAL BONE MARROW VALUES

	No.	mal.	%
Reticulum cells	02	—	20
Blasts	08	—	58
Promyelocytes	10	—	80
Myelocytes—neutrophils	50	—	190
eosinophils	05	—	35
basophils	0	—	10
Metamyelocytes—neutrophils	130	—	370
eosinophils			
basophils			
P.M.N.—neutrophils	70	—	300
eosinophils	05	—	40
basophils	0	—	07
Lymphocytes	30	—	200
Plasma cells	0	—	20
Monocytes	05	—	50
Megakaryocytes	003	—	30
Mitotic cells	0	—	20
Pronormoblasts	10	—	80
Normoblasts—basophilic	70	—	370
polychromatophilic			
orthochromatic			
Myeloid—erythroid ratio	21	—	51

orange or red due to the appearance of a finely dispersed yellow or red precipitate which settles on standing. The amount of sediment is directly related to the concentration of reducing substance present.

Benedict's reagent is reduced by glucose and by a number of other substances occasionally found in urine such as galactose, levulose, pentose, glycuronates and salicylates. In appropriate cases further steps should be taken to identify the reducing substance.

Record results in a roughly quantitative estimate as follows:

Bluish green	1+
Pea green	2+
Yellow	3+
Orange	4+
Red with colorless supernatant	C.R. (complete reduction)

- B CLINITEST METHOD (CLINITEST TABLETS—AMES)** Place 5 drops of urine in a test tube. Add 10 drops of water and 1 Clinitest tablet. Wait 15 seconds after spontaneous boiling has ceased and compare solution with color scale. Record as 0 to 4+.

These tablets react in the same way to the same reducing substances as does Benedict's solution.

- C GLUCOSE OXIDASE PAPER (TES TAPE—LILLY OR CLINISTIX—AMES)** A small strip of the paper is dipped into the urine specimen and read by comparison with the provided color chart. Tes Tape is read 1 minute after dipping. Clinistix is read immediately.

This test is specific for glucose. A good routine plan is to use the nonspecific test for reducing agents on all specimens; then, when positive results are obtained, the reducing substance may be further identified by the use of glucose oxidase paper.

## 6 Microscopic Examination

A 10 ml specimen of urine should be centrifuged at 2500 rpm for 5 minutes within 30 minutes after collection. The supernatant is then discarded, the sediment resuspended by agitation, transferred to a clean glass slide and covered.

Record a roughly quantitative estimate as follows  
Faint cloud visible only against

black background	1+
Easily visible cloud	2+
Opaque cloud	3+
Dense cloud with flocculent precipitate or boils solid	4+

**B SULFOSALICYLIC ACID METHODS** To 2.5 ml of urine in a test tube add 7.5 ml of 20% sulfosalicylic acid. The resulting degree of turbidity is graded 1+ to 4+.

**C BENGE JONES PROTEIN**

1) *Principle* in some patients with multiple myeloma (rarely in other conditions) a protein appears in the urine which is insoluble at 45 C—60 C but dissolves at higher and lower temperatures.

2) *Technique*

a) Place about 10 ml of slightly acid clear urine in a large pyrex test tube. Acidify with dilute acetic acid if necessary. Filter if cloudy.

b) With a thermometer in the tube place in a large beaker of water and heat slowly observing the temperature at which any precipitate appears or disappears.

c) Finally boil the urine if precipitate persists after 2 minutes of boiling filter while hot (near boiling) to remove albumin.

d) Observe appearance of any precipitate during cooling. Repeat Step b if albumin was present.

e) If no protein is present on the sulfosalicylic acid test Bence Jones proteinuria will be absent. If Bence Jones protein is found confirmation by electrophoresis is desirable.

## 5 Sugar

**A BENEDICT'S METHOD** To 5 ml of Benedict's solution add 8 drops of urine and mix. Heat for 5 minutes in boiling water or (less satisfactorily) boil for 1 minute over an open flame. Allow the tube to cool.

The presence of reducing substance is indicated by a change in the color of the solution to green yellow.

### 3 Urobilinogen (Wallace and Diamond Method)

Six to 10 clean test tubes of the same internal diameter are placed in a test tube rack for serial dilution of the fresh urine sample. If the urine contains bile in large amounts the supernatant from the Harrison Spot Test, (above) may be used the bilirubin having thus been precipitated out. In this event it should be remembered that the first specimen is already diluted 1:2.

Five ml of tap water is placed in all but the first test tube. Then 5 ml of urine is pipetted into the first test tube. The urine and water in the second tube are mixed and 5 ml pipetted into the third tube. This procedure is carried out serially through the final tube from which 5 ml is removed and kept for further dilution if required. For the Wallace and Diamond method 0.5 ml Ehrlich's reagent is then added to each tube and mixed. The tubes are allowed to stand for 5 minutes and then read by looking vertically down the tube through the solution at a white background in bright daylight. The end point is recorded as the last dilution in which a faint pink color appears.

In fresh normal urine a pink color may be detected at dilutions of 1:8 to 1:32. A pink color noted in a dilution of 1:64 or greater represents increased urinary excretion of urobilinogen. The absence of a pink color in dilutions of 1:8 or below indicates decreased excretion.

### 4 Porphobilinogen

A. METHOD Place a few ml of freshly passed urine in a test tube. Add an equal volume of Ehrlich's reagent and mix. Now add 2 volumes of aqueous saturated sodium acetate. The development of a red color implies the formation of either urobilinogen aldehyde or porphobilinogen aldehyde (or both). Urobilinogen aldehyde is soluble in chloroform but porphobilinogen aldehyde is not. Hence, they can be separated as follows: Shake a few ml. of the red solution in a test tube (or separatory funnel) with some chloroform. If after settling the aqueous layer still contains red color this layer must be repeatedly separated and reshaken with fresh volumes of chloroform until either the aqueous or

with a cover slip. Valuable data may be obtained from study of the sediment. Repeat examinations often are helpful. The formed elements should be roughly quantitated in terms of the number of each type seen per high power field. To be noted are white blood cells (clumping should be noted), red blood cells, casts, epithelial cells, crystals, and bacteria. The size and appearance of casts should be carefully characterized and reported. Casts should be searched for under the low power of the microscope with the light intensity cut down. The value of sediment study depends on the freshness of the specimen, the manner in which it is collected, and the diligence with which it is examined.

## SPECIAL CHEMICAL TESTS

### 1 Acetone

To 5 ml. of urine add 0.5 ml. glacial acetic acid and 0.5 ml. aqueous solution of sodium nitroprusside and mix. Overlay the mixture with 2 ml. concentrated ammonium hydroxide. A purplish ring at the zone of contact indicates a positive reaction. The intensity of the reaction should be graded 1+ to 4+. Acetest (Ames) tablets provide a simple satisfactory modification of the nitroprusside test. The test for acetone is routine in children.

### 2 Bilirubin

A **FOAM** When a urine sample is shaken vigorously in a test tube, foaming is produced. In urine that does not contain bilirubin the color of the foam is white or pale straw color. A yellow, green, or brown color of the foam is presumptive evidence of the presence of bilirubin.

B **HARRIS : SPOT TEST** Five ml. of urine is added to 5 ml. of 10% aqueous barium chloride, mixed and filtered. The filter paper containing the precipitated material is spread on an evaporating dish, Petri dish, or another piece of filter paper, and 3 drops of Fouchet's reagent is added to the precipitate. The development of a green color indicates the presence of bilirubin, and its intensity may be crudely graded from 1+ to 4+.

presence of phenylpyruvic acid. This test may be used in screening patients for phenylpyruvic oligophrenia.

## 6 Calcium

The *Sulkowitch test* is used to gauge in a gross fashion the amount of calcium in the urine. The Sulkowitch solution is

Oxalic acid	9.5 Gm
Ammonium oxalate	2.5 Gm
Glacial acetic acid	5.0 ml
Distilled water to	150.0 ml

Place 5 ml of urine in a test tube and add 5 ml of Sulkowitch solution. The intensity of the precipitate and the speed with which it appears are used to quantify the reaction from 0 to 4+. The value of this test is limited by the fact that the intensity of the precipitate is a function of the volume of urine flow as well as the quantity of calcium excreted.

## KIDNEY FUNCTION TESTS

### 1 Phenolsulfonphthalein Test (PSP)

#### A. METHOD

- 1) Give the patient 3 or 4 glasses of water in the course of 30 to 45 minutes. Have him refrain from emptying his bladder.
- 2) Ask him to notify you when he thinks his bladder is getting full but before he is uncomfortable. At this point —
- 3) Inject exactly 10 ml of sterile PSP solution (60 mg) intravenously.
- 4) Collect urine exactly 15 minutes and at 2 hours after the dye is injected. Tell the patient to empty his bladder as completely as possible and make sure that all the urine is collected. Include any urine passed between the 15 minute and 2 hour specimens as part of the 2 hour specimen.
- 5) Record the volumes of both specimens and measure their content of PSP as follows:
  - a) Transfer the specimen to a 1000-ml cylinder and alkalinize with sufficient concentrated sodium



the chloroform (bottom) layer remains entirely colorless. If a distinct (usually rather intense) red color persists in the aqueous phase while the chloroform remains colorless, the result is considered positive for porphobilinogen.\*

- B INTERPRETATION** A positive result is almost pathognomonic of acute porphyria. Exceptions are (1) very rare porphobilinogenuria in other conditions (2) a faint pink or orange-pink color (chloroform insoluble but not due to porphobilinogen aldehyde) when the original urine contains large amounts of urobilinogen (3) a similar faint chloroform insoluble color of unknown cause in various other conditions. The last 2 sources of confusion often can be eliminated if the original urine is diluted 1:5 before the test (true porphobilinogenuria will still be demonstrable).

## 5 Salicylates, Ketones, and Phenylpyruvic Acid

To 5 ml. of urine in a test tube add 5 to 10 drops of 10% ferric chloride solution drop by drop with agitation of the test tube until the initial precipitate of ferric phosphate redissolves.

- A SALICYLATES AND KETONES** The development of a dark Burgundy red color indicates the presence of salicylates or ketones. To distinguish the two acidify 5 ml. of urine with several drops of strong acid (HCl); boil vigorously for a few minutes and cool. Then repeat the ferric chloride test on this sample. Persistence of the red-purple color indicates the presence of a nonvolatile compound producing the color and is presumptive evidence of the presence of salicylates. Certain metabolites of coal tar dyes will also cause a positive reaction. Salicylate does not react in the nitroprusside test for urinary ketones.

- B PHENYLPIYRUVIC ACID** The development of a dark bluish green color in the acidified urine indicates the

\* More specific identification requires demonstration of the characteristic absorption band maximum at 550-750 mμ in the visible spectrum. The test is even more conclusive if there is a secondary peak at 5.0-5.5 mμ in the near infrared.

ence and in pregnant women although the dose used will not ordinarily produce a pressor or vasoconstrictor effect.

For results to be meaningful accuracy of urinometers must be checked with water. A normal person should be able to concentrate to 1.025.

## SPECIAL EXAMINATIONS INCLUDING BACTERIOLOGY

### 1. Introduction

Since certain of the abnormalities of the urine associated with urinary tract disease frequently are intermittent, it is often necessary to make repeated studies of the urine before important changes are observed. Bacteria, WBC, RBC, casts and protein may appear in significant amounts or numbers only intermittently in the urine during a 24 hour period. For this reason when a patient is being studied initially for suspected urinary tract disease it is suggested that a careful plan be followed in examining the urine in addition to investigations of renal function and a search for obstructive lesions of the urinary tract. Such a plan might include:

1. Basic examination of random voided specimen  $\times 3$
2. Clean catch or catheterized urine specimen for culture daily  $\times 3$
3. 10 ml. of clotted blood for bacterial hemagglutination test  $\times 2$  with 7 day interval between specimens
4. A timed urine specimen for Addis count and quantitative protein determination  $\times 2$

Patients who might benefit from being examined in this manner would include:

1. All patients suspected of having urinary tract infection
2. All patients with diastolic blood pressure of 100 mm. of Hg or more
3. Patients with diabetes mellitus
4. Patients with decreased renal function or renal failure and anemia
5. Patients who have been subjected to urinary tract catheterization or instrumentation. To detect infection initiated by these procedures the patient should be studied

hydroxide to bring out the maximal purplish red color

b) Dilute to 500 ml with tap water and mix well by stirring. If the resulting color is deep dilute to 1000 ml

c) Fill the empty vial of the PSP colorimeter set with the solution obtained in (b) and compare with standards. If a dilution of 500 ml has been used divide the result by 2

- B INTERPRETATION** At a urine flow of at least 4 ml per minute the PSP excretion reflects (1) renal plasma flow, and (2) renal tubular function. Normal values consist of greater than 25% excretion in 15 minutes and greater than 60% excretion in 2 hours. A bladder residuum may be detected by additional collections if renal function is known to be normal

## 2 Urine Concentration Tests

- A METHOD 1** Do not allow the patient any fluid or food after supper until completion of the test the following morning. Discard the first morning urine. Collect urine specimens at 1 and 2 hours after the first morning urine and measure the specific gravity of each.

This procedure should be employed with circumspection if at all. Patients with chronic renal disease may be made clinically worse by the superimposition of dehydration incident to this technique.

- II METHOD 2** Administer 1 unit of aqueous vasopressin (Pitressin) subcutaneously (preferably soon after the patient arises and before he voids). Considering this as zero time proceed according to the following schedule

TIME	PROCEDURE
0	1 unit aqueous vasopressin s.c.
15 min	Patient voids—discard urine
105 min	Collect urine—measure specific gravity Give another—1 unit dose of aqueous vasopressin s.c.
195 min	Collect urine—measure specific gravity

The administration of vasopressin is unwise in patients with angina, serious hypertension or vascular dis-

- a) Have the patient drink 4 glasses of water (or liquid) and wash the vulva with soap and water. Instruct her to call the nurse when she feels an urgent desire to void.
- b) Have nurse obtain specimen as follows:
  - (1) Expose urethral meatus and clean with four 2x2 in gauze squares using single downward strokes as follows: (a) Use a dry gauze square for a single midline downward stroke. (b) Use a square moistened with pHisohex for each side. (c) Use a square moistened with pHisohex for a single midline downward stroke.
  - (2) Pour 100 ml (approx) sterile saline over the meatus to rinse off the pHisohex. Do not allow labia to close.
  - (3) Instruct the patient to void. Catch a midstream urine specimen in a sterile urine bottle. Do not contaminate the bottle mouth by holding it against the patient's vulva.

*In the male* Clean-catch specimens are satisfactory for culture if carefully taken by or under the direct supervision of a *house officer*. After thorough cleansing of the glans and urethral meatus with *pHisohex* followed by *sterile saline* the patient should be instructed to void and a midstream specimen should be passed into a sterile urine bottle. Cap with a sterile top and label Clean Catch Specimen. The specimen should be sent immediately to the laboratory. If the patient is unable to cooperate a catheterized specimen will usually be necessary.

## 2) Catheterized specimen—

In patients with indwelling catheters urine specimens should be obtained by disconnecting the catheter from the adapter, discarding the urine that drains easily from the catheter and waiting for fresh urine to flow out the catheter. This should be collected in a sterile urine bottle, capped with a sterile cap and sent immediately to the laboratory.

## 3) Cystoscopy—

Urine obtained by urologists at cystoscopy should

at 3 days and at 10 days after the procedure as well as before the procedure if possible

The chronic recurrent nature of urinary tract infection requires that careful follow up studies be carried out on patients treated for this disorder

## 2 Collection of Urine for Examination

- A **RANDOM VOIDED SPECIMEN FOR ROUTINE OR BASIC EXAMINATION** The sample voided on arising in the morning is most satisfactory

*In the adult female* The voided urine is usually contaminated by vaginal secretions containing leukocytes and epithelial cells. Menstrual blood may be introduced into the urine in large or small amounts. Specimens from a female patient should be obtained by washing the vulva with soap and water and having her void directly into the specimen container avoiding contact of the urine with the vulva

*In the male* Specimens may be obtained by having the patient void directly into the specimen container

- B **TIMED SPECIMEN FOR ADDIS COUNT AND QUANTITATIVE PROTEIN DETERMINATION** Use a 1 qt waxed paper carton in which 5 drops of formalin have been placed. *If there is no contraindication to fluid restriction* instruct the patient as follows

- 1) Take no fluid of any sort after noon until the end of the collection period the following morning
- 2) Void and discard urine at exactly 10 P M
- 3) After that save all urine by voiding directly into the container until the end of the collection period
- 4) End collection at exactly 7 A M the following morning by voiding into the container
- 5) Save the entire specimen

- C **SPECIMEN FOR BACTERIOLOGIC STUDIES**

- 1) *Procedures for obtaining clean catch urine specimen—*  
*In the female* Ask the Nursing Service to collect a clean catch specimen. When questionable results are obtained on study of a clean catch specimen a catheterized specimen may be indicated. This should be collected by careful aseptic techniques

- a) Have the patient drink 4 glasses of water (or liquid) and wash the vulva with soap and water. Instruct her to call the nurse when she feels an urgent desire to void.
- b) Have nurse obtain specimen as follows
  - (1) Expose urethral meatus and clean with four 2×2 in gauze squares using single downward strokes as follows (a) Use a dry gauze square for a single midline downward stroke (b) Use a square moistened with pHisohex for each side (c) Use a square moistened with pHisohex for a single midline downward stroke
  - (2) Pour 100 ml (approx) sterile saline over the meatus to rinse off the pHisohex. Do not allow labia to close
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## 3) Cystoscopy—

Urine obtained by urologists at cystoscopy should

be labeled as to source and sent directly to the laboratory

#### 4) Culture—

All specimens should be cultured within 30 minutes after collection or they may be examined within 2 hours if refrigerated immediately after collection

### 3 Examination of Timed Urine Specimen

#### A ADD S COUNT (QUANTITATIVE SEDIMENT EXAMINATION)

- 1) Measure urine collected over a known time period and centrifuge 1/5 hour volume at 1750 rpm for 5 minutes
- 2) Reduce volume at 0.5 ml and resuspend sediment in the remaining urine after adding 1 drop of crystal violet and safranin stain. Transfer a drop to the hemocytometer chamber for count
- 3) Count cells in 3/5 of the area of 1 of the 9 large squares of the counting chamber and multiply by 1 000 000 to obtain the 24 hour excretion rate
- 4) Count casts in 6 of the 9 large squares of the counting chamber and multiply by 100 000 to obtain the 24 hour excretion rate

**B QUANTITATIVE PROTEIN DETERMINATION** An aliquot of supernatant from a 1/5 hour volume obtained in the Addis count is added to Tsuchiya's reagent (phosphotungstic acid in HCL and alcohol) and the volume of the resulting precipitate is measured after centrifugation and converted to Gm /24 hours

### 4 Routine Culture of Urine Flora

Specimens are inoculated on desoxycholate agar, blood agar and trypticase soy broth to determine aerobic flora. Anaerobic cultures are performed on special request

### 5 Gram Stain

Gram stain of urine sediment is important to determine the presence and Gram reaction of small numbers of organisms (for method see Microbiologic Examinations and Collec

tions p 169) The Gram stain will be positive on uncentrifuged urine if 10 or more organisms per ml are present

#### **6 Count of Urine Bacterial Flora**

One ml amounts of serial 10 fold dilutions of urine in peptone water are incorporated into poured trypticase soy agar plates After 24 hours incubation the plates are counted and the number of organisms per ml of urine is reported

#### **7 Special serologic studies for antibodies (hema-glutinins) in the patient's serum against organisms isolated from urine**

#### **8 Cultures for *Mycobacterium tuberculosis* (see Microbiologic Examinations and Collections p 169)**



# 3 Gastric and Duodenal Contents

## METHOD OF COLLECTION

After 8 to 12 hours of fasting a rubber Levin tube is passed if possible through the nose to a point just inside the stomach. The patient then moves from the sitting to the supine position and rolls over slightly to the left side. Gastric contents may now be obtained by applying gentle suction with a syringe. Vigorous suction should be avoided because it may cause gastric bleeding and often obstructs the tube by pulling mucosa into the fenestrations at the end of the tube.

## APPEARANCE

Gastric juice is normally viscid and white to pearly gray in color. Minimal reflux of duodenal secretions will add the yellow color of bile. Duodenal or gastric bleeding may cause the aspirated material to be red or to resemble coffee grounds. The Benzidine Test (see Stool p. 156) may be used to establish the presence of blood.

## GASTRIC ANALYSIS

The volume and acidity of gastric juice are measured during a 1 hour basal period, 1 hour after stimulation with histamine, insulin or broth, and during a 12 hour overnight period. Both histamine base 0.01 mg per kg given subcutaneously and regular insulin 15 units given intravenously provide maximal stimulation for gastric secretion in adults. A 2 hour basal secretion determination appears to be a convenient, more comfortable technique than the 12 hour aspiration. It should be carefully standardized as to the time of day.

Histamine should not be given to patients with a history of asthma or paroxysmal hypertension. Hypoglycemia should be avoided in patients with coronary artery disease.

### 1 Estimation of pH

A. NITRAZINE PAPER may be used

II TOPFER'S REAGENT Add 3 or 4 drops of Topfer's reagent to about 10 ml of gastric contents. Approximate pH is indicated as follows:

COLOR	pH
Red	3.0 or below
Salmon pink	3.3
Yellow	4.0 or above

### 2 Quantitative Titration of Gastric Acidity

If the gastric juice contains much food or saliva, it should be strained through 3 or 4 layers of gauze. Usually unstrained gastric juice is satisfactory. Place 10 ml of gastric juice in a white dish and add 3 or 4 drops of Topfer's reagent. Development of a red color indicates the presence of free acid. To titrate, add 0.1 N sodium hydroxide drop by drop from a burette or pipette, stirring frequently, until the mixture turns canary yellow. The volume of alkali used  $\times$  multiplied by 10 to give the milliequivalents of free hydrochloric acid per 100 ml of gastric juice. To measure the combined acid present, add 3 or 4 drops of phenolphthalein to the dish and continue titration with 0.1 N sodium hydroxide until the liquid remains pink on stirring. Calculation for milliequivalents of combined acid is performed by the same formula as for free acid.

The quantitative study of gastric secretion appears to have some clinical value in assessing to some degree the severity of hypersecretion when such exists.

### 3 Tubeless Gastric Analysis (Diagnex Blue)

This is useful as a screening test in determination of the presence of free acid in the stomach. The test is performed as follows:

# 3 Gastric and Duodenal Contents

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After 8 to 12 hours of fasting a rubber Levin tube is passed if possible through the nose to a point just inside the stomach. The patient then moves from the sitting to the supine position and rolls over slightly to the left side. Gastric contents may now be obtained by applying gentle suction with a syringe. Vigorous suction should be avoided because it may cause gastric bleeding and often obstructs the tube by pulling mucosa into the fenestrations at the end of the tube.

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## 3 Tubeless Gastric Analysis (Diagnex Blue)

This is useful as a screening test in determination of the presence of free acid in the stomach. The test is performed as follows:

- A The patient fasts overnight and omits breakfast
- B On rising the patient empties the bladder and discards this urine
- C Caffeine sodium benzoate 0.5 Gm is taken by mouth with 250 ml of water
- D One (1) hour later the patient voids and saves this urine as a control specimen Then Azure A Resin granules 20 Gm are stirred in  $\frac{1}{4}$  glass of water and drunk. Additional water may be necessary as the granules will not dissolve
- E Two (2) hours after taking the granules the patient voids This specimen is the test urine
- F Both specimens are diluted to 300 ml each with tap water and are read in a color comparator It may be necessary to acidify or heat the test urine to produce the blue color

*Comment* A color intensity of the test urine equal to or exceeding that of the 0.6 mg standard indicates free gastric hydrochloric acid A color intensity between the 0.3 and 0.6 mg standards is presumptive evidence of hypochlorhydria one of less than the 0.3 mg standard indicates achlorhydria A tube gastric analysis using histamine stimulation is indicated when free acid is not clearly present on the Diagnex test

## SPECIMENS FOR CYTOLOGIC EXAMINATION

Secretions and saline washings from the stomach and duodenum may be examined for neoplastic cells It is important that the aspirated material be free from food and barium and that it be submitted to the Pathology Laboratory promptly Enzymes readily digest exfoliated cells and therefore saline washings are far superior to digestive juices for examination Digestion of cells may be slowed by placing the vessels containing the washings in a bowl of ice (see Specimens for the Cytology and Pathology Laboratory's p 199)

## MISCELLANEOUS TESTS OF GASTROINTESTINAL FUNCTION

### 1 Butter fat Absorption Test

This is a simple rapid method of studying fat absorption in patients considered to have the malabsorption syndrome

Favorable correlation has been found with serum chylomicron counts as well as radioisotope labeled fat excretion studies. The test is done as follows:

- A A breakfast meal of 300 Gm of butter, 2 pieces of dry toast or 6 soda crackers, 100 ml of fruit juice and 1 cup of coffee with sugar (no cream) is given the fasting patient.
- B One fasting and 5 hourly samples of clotted blood (6-8 ml blood in a dry clean tube) are collected.
- C During the test period the patient is kept in bed and is not allowed to eat or smoke.
- D The 6 blood samples are taken to the laboratory where turbidity of the serum is measured in a spectrophotometer.

*Normal:* Optical density (OD) above 0.100 from the second to the fourth hour is considered a normal lipemic response to the test meal.

## 2. d (+) Xylose Tolerance Test

This is commonly used as a screening test in patients suspected of having the malabsorption syndrome. It is performed as follows:

- A Give nothing by mouth after midnight on the day preceding the test.
- B When he arises have the patient void and discard the urine.
- C Dissolve 25.0 Gm of d (+) xylose in 250 ml of cool tap water and have the patient drink it. Give an additional 250 ml of water 30 minutes later.
- D Allow no more food or liquid for the remainder of the test period.
- E Collect all urine for a period of 5 hours.
- F Send the 5 hour urine specimen to the laboratory for d (+) xylose determination.

*Comment:* Normal range:  $6.5 \pm 1.2$  Gm d (+) xylose excreted in 5 hours.

Severe renal disease or improper collection of specimen (less than 5 hours or failure to have the patient void beforehand) will give a falsely low value. Collection beyond 5 hours results in a falsely elevated value. As glycosuria causes a

falsely high value indicate on the request slip if the patient is diabetic so that proper correction may be made

### 3 Secretin Test for Pancreatic Function

Have the patient fast overnight. In the morning pass a double lumen tube (Einhorn) to a point just proximal to the ligament of Treitz under fluoroscopic control. Then attach wall suction of 40 cm of water pressure to the duodenal and gastric sides of the Einhorn tube through a system of 2 collection bottles. After a control period (20 minutes) of aspiration give secretin intravenously in the amount of 1.0 clinical unit per kg. of body weight. Four 20 minute collection periods are then completed and the volume and pH of each amount collected (duodenal and gastric) is measured and recorded. At the end of each 20-minute period empty the collection bottles into a graduated cylinder and test with pH paper. Place an aliquot (10-12 ml.) of each of the duodenal aspirates in a dry clean test tube layer with mineral oil, cork tightly, and store in an ice bath or a refrigerator. (The gastric specimens are discarded after measurement.) Label the tubes with name, date and time (20 minutes, 40 minutes, etc.).

On completion of the test take the 5 duodenal specimens (control, 20, 40, 60, 80 minutes) to the laboratory for determination of bicarbonate and amylase. If clinically indicated, an appropriate volume of the duodenal aspirate may be sent to the Cytology Laboratory for examination for atypical or neoplastic cells.

*Interpretation.* A decrease in volume with normal bicarbonate and amylase concentrations is indicative of pancreatic duct obstruction. A normal volume with a diminished bicarbonate and amylase response is indicative of chronic inflammatory disease of the pancreas.

### 4 Screening Test for 5-Hydroxyindole Acetic Acid (5-HIAA) (Ehrlich's Aldehyde Method)

Mix equal parts of Ehrlich's aldehyde reagent and urine. Let stand for 5 to 10 hours. A dark blue color develops if positive. This screening test will be positive if the urine

content of 5 HIAA is greater than 30 mg per liter of urine. This test is not specific for 5 HIAA.

A positive result of the screening test dictates that a nitrosonaphthol test be done by the laboratory. The latter is qualitative and specific for 5 HIAA.



# 4 Stool

## COLLECTION

The patient may collect the specimen himself if supplied with tongue blades and a cardboard container. The specimen may be collected by the physician at the time of rectal examination. Liquid stools and those to be stored for more than a few hours should be collected directly in a wide mouthed screw topped glass jar.

## DESCRIPTION

Break open the stool if formed since exposure to air may change the outside color to dark brown or black. Urobilin gives the normal stool a brown color but this may vary from light yellow in a milk fed infant to green when the diet is high in green vegetables. Gross hemorrhage produces maroon or sticky black stools. Bismuth iron charcoal licorice and altered blood commonly result in black stools. Carrots beets BSP and unchanged blood may produce a reddish hue. Excess fat in the feces may impart a light gray and a silvery sheen that can conceal the presence of urobilin and blood. In the absence of urobilin the light gray clay colored acholic stool develops. The stool is bulky contains undigested food particles and has an offensive odor when there is a deficiency of pancreatic enzymes.

## TESTS FOR OCCULT BLOOD

Stools containing significant amounts of blood may have a normal appearance. Tests for blood are based on the development of color when heme reacts with benzidine or gum guaiac.

### 1 Benzidine Test

Smear a thin layer of stool over a 2 cm square of filter paper using a wooden applicator stick or the gloved finger.

used for rectal examination Cover this area with 3 or 4 drops of benzidine dihydrochloride (not benzidine base) reagent Add the same amount of 11 6% aqueous hydrogen peroxide and mix the reagents The method is semiquantitative and color development should be observed at 1 minute and again at 5 minutes Maximal color development is recorded as gradations from delayed light green to prompt deep blue Stools from a person on a normal meat diet do not give positive reactions Iron and pus cells do not cause a positive reaction False positive reactions are encountered when the hydrogen peroxide is not fresh It should fizz when placed on the specimen

## 2 Guaiac Test

The test is performed in a manner similar to the Benzidine Test The reagents are added in the following order glacial acetic acid fresh gum guaiac solution 30% aqueous hydrogen peroxide Gradations of color from a slowly developing faint blue to an immediate deep blue are recorded The test is 2 or 3 times less sensitive than the Benzidine Test and may give a color reaction with iron A green color with the guaiac reagent is of no significance

## MICROSCOPIC EXAMINATION

### 1 Ova and Parasites

Stool specimens should be examined while fresh Saline enemas may be useful in securing specimens The saline cathartics are preferable to castor oil mineral oil or cascara for this purpose since many cathartics interfere with the identification of parasites

Examination of a saline suspension of stool often permits identification of the commonly found ova and parasites

Instructions for sending specimens to the laboratory are given under Microbiologic Examinations and Collections page 169

### 2 Fat

A METHOD Mix thoroughly on a glass slide a thin film of fresh stool 3 or 4 drops of Sudan III or IV 1 drop of

normal saline and 2 or 3 drops of glacial acetic acid. Cover with a cover slip heat to boiling over an open flame and examine under low and high power magnification. Count the number of fat droplets taking up the orange red dye.

#### B INTERPRETATION

*Normal*—0.5 droplets per high power field

*Slightly increased*—6 or more droplets

*Markedly increased*—droplets of fat and fatty acid crystals occupy about half of the visible material

A normal result may be misleading in patients who are eating poorly and have scanty stools which may have a low total fat but a high fat concentration. In patients with copious stools the concentration of fat may be normal despite a high total daily excretion.

### 3 Muscle Fibers

The presence of meat (muscle) fibers alone may indicate only rapid intestinal transit. If striations are distinct and the edge of the tissue is irregular rather than rounded, pancreatic tryptic enzyme deficiency is suggested.

### 4 Blood and Pus Cells

Stain a smear of stool with Wright's stain (see Hematologic Procedures p. 113). Diarrhea due to bacterial enteritis may be distinguished from that due to staphylococcal food poisoning by the presence of both red and white blood cells from ulcerations associated with the enteritis and their absence in food poisoning.

## TRYPSIN

**A METHOD** Dilute a freshly passed stool specimen collected without contamination by urine serially with water—1:5, 1:10, 1:20, etc. Place 1 large drop (0.1 ml.) of each well mixed suspension on unexposed unfixed Eastman x-ray film and mark the dilution beside each spot. Incubate the film at 37°C. for 1 hour or at room temperature for 1½ to 2 hours. After incubation, wash the film in a stream of cold

water with gentle rubbing dry and mount in the patient's record

- II INTERPRETATION** Complete clearing of the film = designated 4+ clearing only at periphery of the drop = 1+ A control with brown normal stool should be run with each test

Over 95% of normal infants and 88% of children aged 2-5 years will show tryptic activity in at least 1:5 dilution and often to very high dilutions Normal children over 10 and adults usually show no tryptic activity except with gastroenteritis or catharsis

In a young child negative tryptic activity (i.e. less than 1:5 dilution) suggests pancreatic fibrosis False positives may occur in such patients from contamination with urine from oral pancreatic supplement and from action of bacterial gelatinase (potentially present in stools which are not fresh)

#### **DIFFERENTIATION BETWEEN FETAL AND ADULT HEMOGLOBIN IN BLOODY STOOLS OF THE NEWBORN**

- A PRINCIPLE** Most of the hemoglobin in newborn infants is fetal and resistant to alkaline hydrolysis thus providing a means of differentiating it from swallowed maternal hemoglobin which is alkali sensitive
- B TECHNIQUE** Mix a small amount of grossly bloody (not tarry) stool with 5 to 10 parts of tap water in a test tube Centrifuge for 1 to 2 minutes at 1000 or 2000 rpm The supernatant must be distinctly pink; if not, a more concentrated mixture of stool must be prepared Decant or filter the supernatant Add 1 cc of 0.25 N (1%) sodium hydroxide solution to approximately 5 ml of the hemoglobin solution and allow to stand for 2 minutes Note the color a solution containing fetal hemoglobin remains predominantly pink, whereas adult hemoglobin changes to brown yellow If the result is equivocal controls may be run using in place of the stool suspension, the infant's own blood and blood from an adult subject

#### **BACTERIOLOGIC EXAMINATIONS**

See Microbiologic Examinations and Collections page 169

## 5 Cerebrospinal Fluid

### RECORDS

- 1 Record on the Laboratory Sheet the date source (site of puncture) initial pressure final pressure dynamics (if indicated) volume removed appearance clot WBC RBC differential count and Pandy test
- 2 Record in the Progress Notes the date of the procedure the site posture needle size and any difficulty encountered

### PRESSURES

The initial cerebrospinal fluid pressure is the *lowest* pressure obtained with the manometer attached before any fluid has been withdrawn and after the patient has been relaxed as much as possible by decreasing the attitude of acute flexion and allaying apprehension and discomfort. This may require a wait of as long as 5 minutes. If good relaxation is still not obtained this should be carefully noted in the record. Final pressure should be recorded when all the fluid required or obtainable has been withdrawn.

### DYNAMICS

In patients in whom diagnostic lumbar puncture is carried out, an *estimation of cerebrospinal fluid dynamics* is in order only if there is reason to suspect spinal subarachnoid block and the intracranial pressure is not increased. Careful clinical judgment is required in the selection of patients for this procedure.

### QUANTITY OF FLUID REQUIRED FOR EXAMINATION

As a rule about 10 ml of fluid should be obtained and divided into 3 tubes as follows: 2 ml in the first tube for cell count, differential, Pandy test and qualitative sugar determini-

nations 5 ml in the second tube for quantitative protein (and sugar if indicated) and 3 ml in the third tube for STS and colloidal gold. If bacteriologic studies are desired consult Microbiologic Examinations and Collections page 169.

The first 3 ml drawn has the highest and most nearly accurate total protein content. The last fluid withdrawn usually has the fewest cells of traumatic origin.

## GROSS EXAMINATION

The fluid should be characterized as to color and turbidity. A similar tube containing water should always be used as a basis for comparison if there is any doubt about the color or if red blood cells are present for any reason.

## CYTOLOGY

The cell counts should be done at once and checked personally by the responsible physician. Mildly traumatic taps are a source of considerable confusion in the interpretation of cell counts. Crenation of the red cells if present should be carefully noted. The presence of many red cells in the first tube and few in the third tube may also be of significance in this respect.

### 1 Total Cell Count

- A. Shake the fluid well and with a clean pipette transfer 1 drop to the hemocytometer chamber.
- B. Count all the cells seen in the entire ruled area (9 large squares equal 0.9 cu. mm.)
- C. Multiply the result by 10/9 and report as cells per cu mm. If the number is moderately high count the cells in the large central square only and multiply by 10.

### 2 White Cell Count

- A. Draw glacial acetic acid up to the 0.3 mark in a white cell pipette.
- B. Fill the pipette up to the 11 mark with spinal fluid and shake well.
- C. Count all the cells seen in the entire ruled area of the

hemocytometer and multiply by 10/9. No correction is made for the small dilution factor.

This method is used to hemolyze any erythrocytes from lymphocytes. The red cell count is estimated from the difference between the total and the white cell counts.

### 3 Differential Count

- A Centrifuge spinal fluid at high speed for 10 minutes.
- B Decant the supernatant fluid and save for chemical tests.
- C Make a thin smear of the sediment on a clean slide and allow to dry in air.
- D Stain with Wright's stain (see Hematologic Procedures p. 113) using great care to flood the slide gently with water as the smear is very easily washed off. If the cells will not stick to the slide it may be necessary to suspend the sediment in a drop of egg albumin and fix with slight heating before staining.

## PROTEIN CONTENT

### 1 Pandy Test for Globulin

- A Transfer 1 ml. of Pandey's reagent (saturated solution of phenol in water) to a small test tube.
- B Add 1 drop of spinal fluid.
- C Observe the drop as it sinks in the reagent against a black background. The appearance of a definite white halo around the drop of spinal fluid as it sinks in the reagent indicates the presence of an abnormally high globulin content. The amount of globulin present should be graded 1+ to 4+ depending on the density of the cloud. If more than 1 drop of spinal fluid is used many normal specimens will show a faint cloud. The test is valueless in testing fluids containing blood.

### 2 Quantitative Protein Determination

Five ml. of spinal fluid should be sent to the Chemistry Laboratory when a quantitative protein determination is requested. With this amount the sugar content can be determined if the cell count later is found to be increased. The patient may thus be spared a second lumbar puncture.

## SUGAR CONTENT

## 1 Semiquantitative Method for Determination of Glucose

Measuring all amounts carefully with a 1 ml pipette calibrated to 1/100 introduce into each of 6 small test tubes 10 ml of Benedict's qualitative sugar reagent. Layer the cerebrospinal fluid on top of the Benedict's solution with the calibrated 1 ml pipette putting 0.05 ml into the first tube 0.10 ml into the second 0.15 ml into the third 0.2 ml into the fourth and 0.25 ml into the fifth leaving the sixth tube as a control. Immerse the 6 tubes in a gently boiling water bath for 10 minutes and allow to cool. A cerebrospinal fluid sugar below the normal value of 35 mg/ml suggestive of the presence of living bacteria in the subarachnoid space is indicated by the absence of reduction in the tube containing 0.15 ml of cerebrospinal fluid. See the table below for interpretation of the 6-tube test. If this test is done carefully the results are reliable but it should not supplant the more quantitative analysis by the standard sugar method.

CSF SUGAR (MG %) BY BENEDICT'S REDUCTION (+)

CSF (ml.)	750	40-50	30-40	20-30	10-20	<10
0.00	0	0	0	0	0	0
0.05	+		0	0	0	0
0.10	+	+	0	0	0	0
0.15	+	+	+	0	0	0
0.20	+	+	+	+	0	
0.25	+	+	+	+	+	0

## 2 Quantitative Sugar Determination

Send 1 ml of spinal fluid to the Chemistry Laboratory together with a simultaneously drawn specimen of blood for blood sugar. If quantitative determinations of both protein and sugar are desired a total of 5 ml of spinal fluid is sufficient.



**SFS AND COLLOIDAL GOLD CURVE**

Three ml of spinal fluid is required for these tests *It should be noted that the colloidal gold curve is valueless and SFS unreliable in the presence of blood in the spinal fluid whether traumatic or due to organic disease*

**BACTERIOLOGIC EXAMINATIONS****1 Stained Smear**

- A Transfer the contents of tube no 3 to a sterile centrifuge tube and spin at high speed for 10 minutes
- B Decant the supernatant fluid and save for the serologic test and colloidal gold
- C Spread the sediment on 2 clean slides with a flamed platinum loop and allow to dry in air
- D Fix the smears by gentle heating and stain by Gram method and with methylene blue (See Microbiologic Examinations and Collections p 169 )

**2 India Ink**

- A Centrifuge spinal fluid for 10 minutes at high speed Decant the supernatant fluid and save for Chemistry or Serology
- B Put 1 drop of India ink on a clean slide Add an equal amount of sediment mix and cover with a clean cover slip
- C Examine under high dry and low power for the presence of fungi.

**3 Culture**

See Microbiologic Examinations and Collections page 169

# 6 Pleural, Pericardial, Peritoneal, and Synovial Fluids

## COLLECTION

In aspirating these fluids collect 5 ml in a blood bottle for the cell count and 10 ml in a sterile tube for routine bacteriologic examination. Use an anticoagulant (heparin) if the fluid clots. If the presence of tuberculosis or malignancy is suspected collect a larger volume for study (1-2 liters if possible).

## GROSS EXAMINATION

Note the following:

- 1 *Volume* Record in ml
- 2 *Color* Clear, cloudy, yellow, brown, straw, etc.
- 3 *Character* Watery, mucoid, fibrinous, purulent, bloody
- 4 *Coagulation on standing*

## SPECIFIC GRAVITY

This should be determined immediately. If there is an unavoidable delay place 5 ml in each of 3 or 4 bottles to prevent coagulation.

Transudates usually have a specific gravity below 1.015 and do not coagulate on standing. Exudates usually have a specific gravity over 1.018 and frequently coagulate on standing.

## PROTEIN CONTENT

Transudates usually contain under 25 Gm per liter; exudates usually over 30 Gm per liter.

**CYTOLOGY****1 Cell Count**

If the fluid is not grossly bloody or purulent, perform a white cell count by the technique used either for blood or for spinal fluid depending on the number of cells present

**2 Differential Cell Count**

Make a smear of the centrifuged sediment fix by gentle heating and stain with Wright's stain (see Hematologic Procedures p 113)

In examining the stained preparation differentiate and record the relative percentage not only of the cells found in circulating blood but also of endothelial cells and abnormal cells

In patients suspected of having an underlying malignancy about half the available fluid should be sent promptly to the Pathology Laboratory When fluid must be held it should be mixed with an equal volume of 10% formaldehyde and kept in the refrigerator If tuberculosis is suspected send the remaining fluid (1/2 liter if possible) without added formaldehyde to the Microbiology Laboratory

**BACTERIOLOGIC EXAMINATIONS**

When infection is suspected a direct smear of the sediment from 10 ml of fluid should be stained both with Gram's and acid fast stains and examined together with a fresh preparation of the sediment (see Microbiologic Examinations and Collections p 169)

# 7 Skin Testing

## GENERAL DIRECTIONS

Skin testing for sensitivity to the products of certain pathogenic organisms, particularly those involving the lungs has a rather wide applicability. In most instances the test materials should be administered intradermally. A tuberculin syringe and a no. 25 or 26 needle is employed and the intradermal localization is assured by the raising of a bleb. The test material should be carefully checked as to concentration, expiration date, reconstitution date and evidence that the material has been properly stored. It is well to record the appearance of the test site 24, 48 and 72 hours after administration. The reaction should be carefully measured and described.

## SPECIFIC TESTS

1. The most widely used skin test is the *Tuberculin Test*. The intermediate strength purified protein derivative (PPD) is adequate for routine purposes and is approximately the equivalent of Old Tuberculin in a 1:1000 strength. First strength PPD may be used when a severe reaction is suspected to have occurred in the past. Second strength is employed in those with a negative reaction to the intermediate strength test.
2. The commonly used *Fungus Skin Test Antigens* are *Blastomycin*, *Histoplasmin* and *Coccidioidin*. This form of skin test has become very widely used as these diseases have gained clinical importance. The 3 antigens mentioned should be used simultaneously in order to facilitate the interpretation of cross sensitivities particularly involving the latter 2.
3. A heterogeneous group of antigens each of which may have occasional application includes the *Trichina Antigen*.

*Lygranum* (for *Frez Test*) *Diphtheria Toxin* (for *Schick Test*) *Echinococcus Antigen* *Toxoplasma Antigen* and *Cat Scratch Disease Antigen* The last 3 antigens are not easily available or widely applicable The *Kleim Test* for sarcoidosis is at times helpful but the antigen is not easily available or well standardized

## 8 Microbiologic Examinations and Collections

### GENERAL PRINCIPLES

- 1 *Prior if possible to chemotherapy of any form collect sufficient material of the variety most likely to contain the causative organism*
- 2 Be sure that the *uncontaminated* specimen reaches the laboratory as soon as possible after collection
  - A Many organisms are susceptible to injury by drying exposure to air and chilling. When indicated or when the specimen is unavoidably small the laboratory should be requested to bring the culture mediums and slides for smears to the bedside and should be told which of the requested studies are most important
  - B Normal flora or contaminants may grow to such an extent during transportation of specimens as to obscure the pathogens present
- 3 Select the proper container and appliance for collecting each specimen. *Do not contaminate the outside of the container.* Make sure that the *patient* and the *source of the specimen* are clearly and unmistakably identified
- 4 Optimal volumes for blood, cerebrospinal fluid and other specimens are indicated below but it is recognized that particularly in pediatric patients only smaller volumes may be available. The laboratory staff will do its best to employ the available specimens effectively

### EXAMINATION OF FRESH PREPARATIONS AND STAINED SMEARS

#### 1 Examinations Indicated

As a general rule the physician responsible for the patient

*Lygranum* (for *Frei Test*) *Diphtheria Toxin* (for *Schick Test*) *Echinococcus Antigen* *Toxoplasma Antigen* and *Cat Scratch Disease Antigen* The last 3 antigens are not easily available or widely applicable The *Kleism Test* for sarcoidosis is at times helpful but the antigen is not easily available or well standardized

normal saline. The number and type of formed elements should be noted and if the presence of fungi is suspected the addition of 20% NaOH or 5-10% KOH to the material on the slide may facilitate their demonstration.

The laboratory staff examines some specimens directly. The primary responsibility for most of these studies usually rests however with the responsible physician. The laboratory staff gives directions regarding the preparation of materials for study and will supply the needed stains and solutions. It will also examine smears or preparations brought to the laboratory if questions should arise.

## TYPES OF SPECIMENS

### 1 Blood for Culture

Members of the laboratory staff collect blood specimens for culture except on pediatric patients. The routine procedure for blood culture utilizes trypticase soy broth, thioglycollate broth and poured plates. The cultures are studied for a period of 7 days. This procedure is designed for the isolation of all common pathogens. Request: Routine Blood Culture except when the following are suspected: subacute bacterial endocarditis, brucellosis, *Neisseria* species, septicemia, *Bacteroides* septicemia, pneumococcal septicemia. In these instances make the request specific for the suspect organism or group of organisms.

### 2 Blood for Direct Examination

When infections such as malaria, rat bite fever, relapsing fever, kala-azar, etc. are suspected, consult the laboratory concerning preparation of blood for direct examination.

### 3 Specimens from Nose, Nasopharynx, Pharynx, Ears, Mastoids, Paranasal Sinuses, and Larynx

Sterile Bradford swabs (cotton tipped wire) and cotton tipped wooden applicators are to be used and then immersed in tubes containing trypticase soy broth to prevent drying. If frank pus or tissue can be obtained it should be sent in a sterile tube or bottle.



should make the indicated direct examination on various specimens as follows

- A SPUTUM Gram and acid fast stained smears KOH preparation and Wright's stain
- B URINE FROM PATIENTS SUSPECTED OF HAVING INFECTION OF THE URINARY TRACT A Gram stained smear of the sediment
- C PUS AND EXUDATES FROM VARIOUS SOURCES A Gram stained smear Also an acid fast stained smear and a KOH preparation may be indicated
- D CEREBROSPINAL FLUID Gram and methylene blue stained smears

## 2 Staining Techniques

All smears should be fixed before staining by gentle heating over a gas flame Do not overheat

A METHYLENE BLUE STAIN Flood the slide with methylene blue solution for 1 minute Wash under running water and dry by blotting

B GRAM STAIN Flood the slide with gentian violet for 1 minute Wash gently with water Flood the slide with Gram's iodine solution for 1 minute Wash gently with water Decolorize with acetone ether until the fluid is no longer blue tinged Flood the slide with safranin for 30 seconds Flood the slide with water and dry by blotting

C GENTIAN VIOLET STAIN FOR VINCENT'S ORGANISMS Flood the slide with gentian violet for 30 seconds Wash and dry by blotting

D ACID FAST STAIN Flood the slide with Kinyoun's stain for 3-5 minutes Decolorize with acid alcohol until only a faint pink color remains Wash with water Flood with methylene blue for 1 minute Wash with water and dry by blotting

## 3 Wet Smears and KOH Preparations

Certain specimens (sputum pus vaginal discharge urine sediment) may be advantageously examined as wet preparations either without alteration or after dilution with

the margins and angles of the lids. Specimens from the cornea are obtained with special instruments by an ophthalmologist. Previous arrangements should be made with the laboratory for immediate examination and culture of these specimens since they tend to dry rapidly and become unsatisfactory for study. The type of studies desired may be discussed at the time the laboratory is asked to schedule the culture. If a routine culture of exudate is desired request "Culture for Aerobic Flora." This will be accomplished by inoculation of human blood agar, chocolate blood agar, thioglycollate broth and trypticase soy broth which will permit isolation of most of the common bacterial pathogens.

## 5 Sputum and Bronchial Secretions

Direct examination of Gram, Wright and acid fast stained smears and of fresh preparations of sputum should be performed by the responsible physician as a part of the initial examination of every patient with suspected pulmonary infection.

Fresh sputum for culture of the common aerobic and anaerobic flora is collected in sterile 6-oz. plastic lined paper cups with tops. Have the patient rinse his mouth thoroughly with water to clear it of saliva. Then instruct him to cough and expectorate directly into the container which is sent immediately to the laboratory. When feasible an early morning specimen is usually most suitable for study. The physician requesting the specimen should make sure that a specimen of sputum is obtained. Saliva is not acceptable for culture. Negative results on poor specimens are of no value.

The routine study of sputum is accomplished by inoculating a tube of thioglycollate broth, desoxycholate agar and human and sheep blood agar plates. This permits the isolation of most of the common pathogens. Routine Culture should be requested with the following exceptions:

- A When a *lung abscess or suppurative pneumonitis* is suspected request "Routine and Anaerobic Culture with Anaerobic Plates."

- A NOSE Pass a sterile swab without touching the antrum first above then below the lower turbinates. The specimen is cultured on human blood agar.
- B NASOPHARYNX Pass a Bradford swab straight back through the nose until it comes in contact with the posterior nasopharyngeal wall then rotate the swab gently in this position before removing it. The specimen is cultured on human blood agar.
- C OROPHARYNX Thoroughly rub the back of the patient's throat and tonsils or tonsillar fossae being careful not to contaminate the swab as it is passed through the mouth. The specimen is cultured on sheep blood agar and a sheep blood agar pour plate is made to detect beta hemolytic streptococci.

The foregoing procedures permit identification of the more common aerobic bacterial flora of these areas. If the following organisms are suspected the physician should request special studies for them: group A streptococci, *Corynebacterium diphtheriae*, fusospirochetal symbiotic disease (Vincent's angina) (submit thin smears of material from lesions), *Neisseria meningitidis*, *Hemophilus pertussis*, anaerobes. When tuberculosis or infection with molds, yeasts, or actinomycetes is suspected, perform direct examination and request direct examination and culture for the organism suspected.

- D PARANASAL SINUSES EARS MASTOIDS These are usually collected by a member of the ENT Service and cultured on human blood agar and desoxycholate agar and in thioglycollate broth.
- F LARYNX These specimens are collected by a member of the ENT Service and cultured on human blood agar. If tuberculosis or a mycotic infection is suspected, a biopsy specimen of the lesion should be submitted with a request slip indicating which studies are desired.

#### 4 Specimens from the Eyes

Exudate from the conjunctiva may be collected on small cotton swabs after washing the eye with sterile normal saline to remove superficial exudate. Avoid contact with

**7 Cerebrospinal Fluid**

When possible at least 5 cc of cerebrospinal fluid in a sterile test tube should be sent immediately to the laboratory. The routine procedures for study of spinal fluid allow the isolation of the more common pathogens and consist of studies of Gram and methylene blue stained smears and culture on human blood agar chocolate agar trypticase soy broth and thioglycollate broth. All cultures except the last are incubated in an atmosphere of about 10% CO<sub>2</sub>. Request: Routine smear and culture except when the following are suspected:

- A **TUBERCULOSIS** Submit 10 ml of fluid in a sterile tube and request: Smear and culture for *M. tuberculosis*. This request may not be combined with requests for other studies since studies for *M. tuberculosis* usually are performed in a separate laboratory.
- B **CRYPTOCOCCOSIS** Submit 5 ml of fluid in a sterile tube and request: Direct examination and culture for fungi.

**8 Pleural Pericardial Peritoneal and Synovial Fluids**

Small amounts of these fluids may be sent to the laboratory in sterile test tubes. Larger amounts (1-2 liters) may be sent in the large bottles that are included with the collection tray. The routine method of studying such fluids includes examination of a Gram-stained smear and aerobic and anaerobic cultures. When a pyogenic infection is suspected request: Routine smear and aerobic and anaerobic culture.

- A When tuberculosis is suspected send a separate specimen and request: Smear and Culture for *M. tuberculosis*.
- B When infection with one of the molds yeasts or actinomycetes is suspected request: "Direct examination and Culture for Fungi, including Actinomycetes."

**9 Urine**

(See section on Urine page 137 for details of collection of specimens and special examinations and bacteriologic studies.)

- B When an infection with molds yeasts or actinomycetes is suspected request Direct Examination and Culture for Fungi Including Actinomycetes Routine culture may be requested on the same specimen if desired
- C When *M. tuberculosis* infection is suspected a separate specimen in a 6-oz plastic lined paper cup must be submitted This is essential since these specimens usually are processed and studied in a separate laboratory The patient's name is written on the outside of the cup (not on the lid) A 24 hour collection of sputum is most satisfactory for this study Leave the container at the bedside until collected early each morning for prompt dispatch to the laboratory Request Smear and Culture for *M. tuberculosis*
- D When *H. pertussis* infection is suspected it is best to collect a nasopharyngeal cough specimen with a Bradford swab Schedule study of the specimen with the laboratory in advance
- E Bronchial secretions are collected in special containers such as Tucker or Clark collectors Request studies as outlined for sputum Specify if studies for *M. tuberculosis* are requested in addition to other studies Only 1 specimen is required If the specimen is small indicate which studies are most important

#### 6 Gastric Washings for *M. tuberculosis*

Within 30 minutes after the patient awakens while he is fasting and before he gets out of bed pass a sterile Levin tube and aspirate the gastric contents with a sterile 50 cc syringe If 50 ml of material is not obtained have the patient drink 50 ml of water and reaspirate until about 50 ml of material is obtained Place the specimen in a sterile urine bottle cap with a sterile top and send to the laboratory early in the morning Specimens deteriorate if not processed shortly after collection Request Culture for *M. tuberculosis* Smears of gastric washings are of no value and should not be requested

diarrhea request Culture for Pathogenic Species of *E coli* Special attention will be paid to the *E coli* of the flora When enteric tuberculosis is suspected consult the laboratory staff concerning methods of study

**B SPECIMENS FOR PARASITOLOGIC EXAMINATION** Routine examination for ova and parasites may be accomplished by sending stools collected in plastic lined paper cups as described above to the laboratory Request Routine Examination for O and P \* When a patient is suspected of having amebiasis the following procedure is suggested

- 1) Collect specimens before the patient has received antibiotics that affect the stool flora Administration of the broad spectrum antibiotics makes examination for *Amoeba* unsatisfactory
- 2) Avoid presence of *barium bismuth oils* and *oil suspensions* in the specimen A lapse of 72 hours after administration of such preparations is necessary before suitable specimens can be collected.
- 3) Collect 3 normally passed stool specimens Obtain each at a different defecation Collect 1 purged stool Do not use castor oil or magnesium sulfate to purge the patient Sodium sulfate is satisfactory Try to obtain a specimen that contains only small amounts of formed fecal material Collect 1 specimen by using a high enema with tepid physiologic saline Supervision to insure that the ileocecal region is reached is important The last portion of the defecation is preferred Collect 1 specimen at the time proctoscopic examination is performed Special swabs for collecting these specimens may be obtained from the laboratory After collecting the specimen, replace the swab in the test tube containing saline solution

It is essential for best results that all liquid stools be examined immediately after collection and formed stools within a few hours after collection Maintenance of the

When the presence of *S. dysenteriae* is suspected, addition of stool specimen to Levinthal's medium is suggested with Request Examination for *Shigella*

When tuberculosis is suspected collect a 24 hour urine specimen in a large sterile bottle which should be kept cold (4 C ) during the period of collection. Avoid filling the bottle to the top. Cap the bottle tightly and send it (while still cold) to the laboratory as soon as possible after collection is completed. Request Culture for *M. tuberculosis*. Smears on urine specimens for acid fast organisms often disclose nonpathogenic acid fast organisms and may be very misleading. They are not recommended as a method of study.

## 10 Feces

Specimens are sent to the laboratory in 6 oz nonsterile plastic lined paper cups with lids. Each specimen should consist of 50 to 100 Gm (2 3 o ). It is unnecessary to send the bedpan to the laboratory. The outside of the container should not be contaminated. The patient's name should be written on the container and the specimen should be accompanied by a completed request form. The specimen must be free from barium bismuth and oily suspensions and should not be mixed with urine. The patient may be instructed to pass the stool directly into the container. The specimen should be sent to the laboratory immediately.

**A SPECIMENS FOR BACTERIOLOGIC STUDIES** For detection of *Salmonella* species, *Staphylococci* and pathogenic species of *Escherichia coli* the collection of specimens as described above is satisfactory. *Shigella* species may be isolated by this method. These organisms are very sensitive to factors in the outside environment however and the incidence of isolation can be increased by collecting a specimen direct from the anus with a rectal swab or at the time a proctoscopic examination is performed and immediately inoculating media at the bedside. Media and instructions for inoculation may be obtained from the laboratory.

The routine method of culturing stools includes the use of enrichment media, differential and selective media and a special plate for staphylococci. This is satisfactory for detecting all the common pathogenic bacteria. When *E. coli* is suspected of causing infantile

- B If an infection with a mold or a yeast is suspected, request "Direct Examination and Culture for Fungi." Request special cultures for *Actinomyces* if these are suspected.
- C If a gonococcal or meningococcal infection of a joint is suspected, request "Smear and Culture for *Neisseria Species*." This may be combined with the request for routine culture.

## 12 Darkfield Examinations

These may be arranged specially by consulting the staff of the laboratory.

## SENSITIVITY STUDIES

When it seems probable at the time cultural studies are requested that sensitivity studies will be needed, write "Hold for sensitivity studies" on the request slip. The house officer usually is responsible for choosing sensitivity studies, if these are necessary within 48 hours of the time laboratory personnel have reported the organisms. If in doubt as to which antibiotics are most likely to be effective, request Infectious Disease Service consultation.



stool specimen at body temperature is not essential. If a specimen must be stored overnight it should be held at 4 C.

The routine method of examining stool specimens for ova and parasites includes direct examination of unstained and stained (Quemel stain) specimens and examination of concentrated specimens. Cultures are done on selected specimens after consultation with the laboratory service.

When a patient is suspected of having pinworms (*Enterobius vermicularis*) use a Graham swab which is a modification of the popular NIH swab for collecting the specimen. This consists of an 8 x 1 cm strip of cellophane adhesive tape. Press the sticky surface of the tape over the perianal area and then place the sticky side down over a clean slide and send to the laboratory.

### 11 Pus from Wounds Abscesses Pyarthroses and Various Other Lesions

Pus may be collected from closed lesions by means of a syringe and needle and transferred to a sterile test tube. The use of cotton swabs is to be avoided if possible. When feasible use a sterile dropper for collecting small amounts of pus from open lesions. Several ml may be collected and placed in the dropper bottle or if only a small amount is obtainable it may be left in the dropper which is replaced in the bottle. If no fluid can be collected with the dropper and the surface of the lesion is swabbed with a cotton swab as a method of collecting pus 2 swabs immersed in 1 ml of trypticase soy broth should be sent to the laboratory for culture. (Do not break off sticks.)

The routine method of culturing specimens of pus includes the inoculation of a human blood agar plate differential media for the enteric organisms and culture in thioglycollate broth and a tube of trypticase soy broth. These methods permit the isolation of all the common pyogenic organisms. Request Routine Aerobic and Anaerobic Culture except—

1. If tuberculosis is suspected submit a separate specimen and request form and request Smear and Culture for *M. tuberculosis*.



## 9 Serologic Tests

### BLOOD

When blood is collected for serologic tests it is important that the following precautions be observed. Use a dry sterile syringe. Use aseptic technique and collect the required amount of blood as indicated in the following table. Place the blood in 1 or more if necessary sterile 100×16 or 100×13 mm tubes without anticoagulant. Stopper the tube with a sterile rubber stopper. Write the patient's name, unit number, and date of collection on the label that is on the tubes supplied. Complete the request slip which must be signed by the physician making the request. Attach the request slip to the tube. Send the specimen to the Serology Laboratory. When possible collect blood after a period of fasting (i.e. before breakfast).

The demonstration of a change in titer of specific antibodies in the blood of patients requires the study of at least 2 specimens.

In addition to the tests listed in the following table, most serologic laboratories also perform the following tests on serum upon request: (1) C reactive protein, (2) cryoglobulins, (3) bacterial hemagglutination tests (patient's serum tested against antigen extracted from an organism isolated from the patient).

### CEREBROSPINAL FLUID

See page 163

### ADDITIONAL COLLECTIONS

Serial and supplementary specimens are frequently indicated. These collections should be planned in cooperation with the Virus Laboratory

In the rare situation in which consultation is not practical the following outline may be useful

- 1 Two additional stool specimens as early in the course of the illness as possible
- 2 Ten to 15 ml of clotted blood before discharge and on a return visit in 3 to 6 weeks

### HANDLING OF SPECIMENS

It is usually advisable to make arrangements for temporary storage of specimens that cannot be delivered to the Virus Laboratory within 30 minutes of collection

- 1 Clotted blood should be refrigerated but not frozen before aseptic separation of serum. After removal from the clot serum may be frozen
- 2 All other specimens should be refrigerated, preferably in the freezing compartment

Specimens should be clearly labeled in pencil with the patient's full name unit number and date of collection

When specimens are to be collected by another physician after discharge from the hospital appropriate instructions regarding handling and mailing can be obtained from the Virus Laboratory and sent to him

# 10 Collection of Specimens for Virus Studies

## INTRODUCTION

At present virus studies in most laboratories are only applicable to selected clinical case material. In order to collect initial specimens that are appropriate to the clinical problem and adequate for study, the physician should call the Virus Laboratory for consultation before submitting specimens. If consultation cannot be obtained promptly, the following outline of initial collection and preliminary handling of specimens may be helpful. Of course, consultation with the responsible laboratory personnel concerning the clinical problem is still strongly indicated at the earliest opportunity.

## DAY OF ADMISSION

### 1 Clotted Blood

10 to 15 ml collected aseptically in a sterile test tube

### 2 Cerebrospinal Fluid

2 to 3 ml in a sterile test tube (if a lumbar puncture is indicated)

### 3 Throat Swab in 3 ml of broth

### 4 Stool Specimen in a 6-oz clean but not sterile plastic lined paper cup

### 5 Aliquot of Transudate or Exudate (pericardial pleural peritoneal articular etc) in a sterile test tube

person. In most Blood Banks blood is not released to orderlies, aides, or other nonprofessional individuals. The person taking the blood must check the names and numbers on the bottles, donor cards, and requisitions. After 5:00 P.M. and on weekends most Blood Banks have a special log book which must be filled out. Most transfusion reactions result not from cross-matching errors but from administration of blood to the wrong recipient. Therefore scrupulous, careful double-checking is essential.

Most blood will be in plastic bags; some will be in bottles. The principle of administration is the same with both types of containers. Blood should be administered as soon as possible after removal from Blood Bank refrigerators. Potentially fatal reactions increase in proportion to the time the blood is warm and the number of times the container is entered. Therefore blood which is not given promptly should be discarded. Storage in other refrigerators, such as those at nursing stations, is not adequate. Blood which has been out of the Bank for more than 30 minutes or which has been entered may not be returned for re-use. Once the pilot tube is removed, the blood cannot be re-used by the Bank and is usually charged to the service.

It is suggested that medications such as antihistamines not be added to blood but, if desired, administered separately.

If any kind of transfusion reaction occurs, blood infusion should be immediately discontinued and 10 ml. of the patient's blood drawn. This and the remainder of the donor blood should be returned to the bank promptly for smear, culture, and recross match. In addition, the hemoglobin in the patient's serum should be determined. The next sample of urine obtained from the patient following the reaction should be checked for hemoglobin.

The commonest types of transfusion reactions are (also see tabulation on pages 186 and 187):

- 1 Hemolytic reaction due to blood group incompatibility
- 2 Pyrogenic reaction
- 3 Allergic (urticarial) reaction
- 4 Volume reaction due to circulatory overload
- 5 Air embolism

In addition, delayed reactions due largely to infectious agents may occur.

# 11 Use of the Blood Bank

## GENERAL

*It is important to learn the location and regulations of the Blood Bank so that its facilities may be effectively used particularly in emergencies. In addition to typing and cross matching the following procedures usually are carried out*

- 1 Coombs antiglobulin test
- 2 Rh sensitivity and titer
- 3 Rh subgroups and other minor blood groups when indicated within the limits of availability of antisera
- 4 Investigation of hemolytic anemias and rare antibody studies on consultation

*For the foregoing procedures 5 ml of clotted blood should be submitted with the appropriate requisition*

## BLOOD FOR TRANSFUSION

To obtain blood for transfusion the appropriate requisition should be submitted with a specimen of the patient's clotted blood. Five to 10 ml is usually sufficient depending on the number of units requested. If 6 or more units are needed 15 ml will be required. This should be submitted as soon as possible before the time the transfusion is to be given. Transfusions for patients admitted for surgery should be requested by 3:00 P.M. of the day before the transfusion is to be given. Routine requests for transfusion when the patient is not in dire need of the blood should be in the Blood Bank by 2:00 P.M. or they will be postponed until the following morning. Emergency transfusions may of course be requested at any time. The telephone operator will have the name of the technician on call for emergency cross matching at night and on weekends.

*When blood is to be given it must be checked out of the Blood Bank by a house officer, nurse or other responsible*

<i>P<sub>1</sub> e</i>	I tread t t blood t m t t rec d m t l (p t t d d bl d t m ba t r b t m t h l res t --E d d gly m l l m ta t t og s botas ca w l aua t t (Py m) f pod	C d ed ty pt m --M l d S l e t h l l M l d f --S re (ra ly f t l) Prol ged ch l l (do g r f t t f --F (l l h l t ) --R h l ) k d p t t	U b ve rroc dia t red e h mobyt re t	--U diap bl q pm t t na f l l w t r u t g q pm f A t --St p t fus n t first g --Cal m gl t (l l )
<i>All e e</i>	I t du t f d l l g t p t t blood P tra f f d hyp m t vity	Urtica Asthma A p t d m	St dy pat t f m s f ll gy	P i fast g d m g e d m --U t u l l g e d m f i --St p tra fu n l as o ly ympt m m l d u t ca d --f p ph e hyd oct f d --A t h t m
<i>O l l e</i>	R p d cm trat f b l d t p t t w th w k h t	P lin ry d m S gn f d f l C d m t		P i pt t m em r g y t ke t l l h to m 300 ml of bl od --D t erl ad p t ent with I V fl ds
<i>Emb l e</i>	Adm stration f --l l edeo ta g d ts --A	Symptoms of mbol m		Pr e t v --Always f l t r bl d --Do n t g ve bl d u d press f o d bl be cause f d g t of m bol m

C t y f D R F B S  
t N t l l h m l yu t fus  
b k por bl mas t f l l w g f re  
C l res C Th mas P b l t e 1956)

r d e t t h q For further f m t c e g r et  
l l t M l l P L Bl od Tra fus o n Cl cal Med ca (2 d ed Sp g f el d l l)



# CLINICAL ANALYSIS OF TRANSFUSION REACTIONS

CLINICAL HISTORY	ETIOLOGY	CLINICAL FINDINGS	LABORATORY PROCEDURES	TREATMENT
<p>H m hct 4</p> <p>Int acaul f</p> <p>h m ly f</p> <p>mp t bl</p> <p>d n</p>	<p>Adm utrat n f</p> <p>A B O AB blood f</p> <p>gro p O ec p t</p> <p>AB b f d to</p> <p>gr up A p t</p> <p>AB b f ed t</p> <p>gr up B p t</p> <p>Adm utrat n f</p> <p>Rt i blood to n</p> <p>t d Rh g p</p> <p>t t</p>	<p>H m hct (1-4)</p> <p>O t u u lly f t</p> <p>100 200 ml ec ty</p> <p>d pend la g ly n</p> <p>ant body t t t</p> <p>p t um</p> <p>Le d anal sympt n</p> <p>gr h n h d g n</p> <p>calaz d t gl g ub</p> <p>st n l pp n</p> <p>Lunary pe n</p> <p>Chill flow d by T</p> <p>105 p</p> <p>Osh d d n f</p> <p>Rest n n a x ty</p> <p>N us a nd om ung</p> <p>Coll p</p> <p>Low bl d pre u</p> <p>B n i mp f n</p> <p>M l d</p> <p>T an nt l g m a</p> <p>wh nstr g n e</p> <p>t at n</p> <p>S re</p> <p>t nt l g u a</p> <p>D th u u m n</p> <p>4-10 d ya n l x d</p> <p>u</p>	<p>V n puncta e imed at by</p> <p>nd 6-18 h f e a t</p> <p>ll m gl h n m and b f</p> <p>rub n n a</p> <p>U naly f n t n 4 l )</p> <p>Colo do k b n h t d</p> <p>lrot n post c</p> <p>B n d post c</p> <p>M c o p r f w r d d</p> <p>p g n t d lls</p> <p>R ch k g up ng d Rh</p> <p>type f pat nt a d blood n</p> <p>d o fast</p> <p>R ch k m t h ng</p> <p>C trid g bl od from d o</p> <p>R k f p e n of hem t</p> <p>ys</p> <p>If Rh n g h k c p nls</p> <p>blood f nt Rh aggr n</p> <p>U d no gr p O d</p> <p>t p t gro p A B AB</p> <p>(pat don run aga</p> <p>cap t c n</p>	<p>P at</p> <p>U of m t eul u lly n</p> <p>t ry t ch ign ca efully</p> <p>p r v d</p> <p>A da c f m tak s m</p> <p>lab ing flail s te</p> <p>A d t of u of fro n</p> <p>blood old bl od te</p> <p>4 f</p> <p>St p tran fus on at rat gn</p> <p>f r i n</p> <p>Sp bhm e l hydrochlo d</p> <p>T eat h ck f t d v lops</p> <p>Th e is no tat f t y</p> <p>treatment of renal mpt</p> <p>t t n gh ma y at n</p> <p>r mme d ikal t</p>
<p>Int acaul f</p> <p>h m ly f</p> <p>mp t bl</p> <p>d n</p>	<p>Adm utrat n f</p> <p>A B O AB blood f</p> <p>gro p O ec p t</p> <p>AB b f d to</p> <p>gr up A p t</p> <p>AB b f ed t</p> <p>gr up B p t</p> <p>Adm utrat n f</p> <p>Rt i blood to n</p> <p>t d Rh g p</p> <p>t t</p>	<p>H m hct 4</p> <p>Int acaul f</p> <p>h m ly f</p> <p>mp t bl</p> <p>d n</p>	<p>V n puncta e imed at by</p> <p>nd 6-18 h f e a t</p> <p>ll m gl h n m and b f</p> <p>rub n n a</p> <p>U naly f n t n 4 l )</p> <p>Colo do k b n h t d</p> <p>lrot n post c</p> <p>B n d post c</p> <p>M c o p r f w r d d</p> <p>p g n t d lls</p> <p>R ch k g up ng d Rh</p> <p>type f pat nt a d blood n</p> <p>d o fast</p> <p>R ch k m t h ng</p> <p>C trid g bl od from d o</p> <p>R k f p e n of hem t</p> <p>ys</p> <p>If Rh n g h k c p nls</p> <p>blood f nt Rh aggr n</p> <p>U d no gr p O d</p> <p>t p t gro p A B AB</p> <p>(pat don run aga</p> <p>cap t c n</p>	<p>P at</p> <p>U of m t eul u lly n</p> <p>t ry t ch ign ca efully</p> <p>p r v d</p> <p>A da c f m tak s m</p> <p>lab ing flail s te</p> <p>A d t of u of fro n</p> <p>blood old bl od te</p> <p>4 f</p> <p>St p tran fus on at rat gn</p> <p>f r i n</p> <p>Sp bhm e l hydrochlo d</p> <p>T eat h ck f t d v lops</p> <p>Th e is no tat f t y</p> <p>treatment of renal mpt</p> <p>t t n gh ma y at n</p> <p>r mme d ikal t</p>

# 12 Use of the Clinical Chemistry Laboratory

## INTRODUCTION

Clinical chemistry determinations have assumed an increasing role in the diagnosis and management of complicated illnesses in recent years. This is due in part to technologic advances and in part to improved understanding of pathologic physiology and the interpretation of the values obtained. The laboratory however can be of the greatest assistance to the clinician when it is not misused. Each study requested should have a specific indication, namely the obtaining of meaningful data. Values should not be obtained for the record. The manner of selection and handling of the specimens is of vital importance. Blood for chemistry determinations should be placed under oil from the collecting syringe, dispatched to the laboratory, and the red cells and serum separated by centrifugation. Hemolysis is ordinarily not a major problem when these specimens are carefully handled, and even 1/2% hemolysis is easily noted by the alert technician. Failure to separate the cells from the serum may result in significant errors; for example, within 8 hours at room temperature as much as 0.5 to 1.0 mEq/liter of potassium may leak from the red cells into the serum, an even greater rise may occur in serum inorganic phosphorus. The circumspect use of the Clinical Chemistry Laboratory with careful attention to details will often make an important contribution to the understanding of the clinical problem.

Clinical chemistry determinations should not be relied on to the exclusion of simple clinical observations, in particular serial weights, intake and output records. Often simple laboratory studies are helpful in interpreting chemical data.

Following any transfusion particularly one given during anesthesia the container should be saved for 24 hours before discarding since some reactions may not become apparent for several hours

The following products other than blood usually are available in the Blood Bank for clinical situations in which they may be useful

- 1 *Plasma*—aged individual units Pooled plasma ■ not available
- 2 *Fresh Fro en Plasma*—primarily for use in hemophilia
- 3 *Old Fro en Plasma*—for use in Christmas disease
- 4 *Salt Poor Serum Albumin*

## DONORS

Most blood used is obtained from blood donors who come to the hospital Therefore it is imperative to have an effective and continuing program of donor recruitment by the house staff Each patient receiving blood is charged for it Re payment of blood by donors is urged but blood which is not replaced for him will be charged

Usually a system of credits and debits for each clinical service is in effect Each service is required to furnish enough donors to maintain a positive balance in the bank If any service does not have a positive balance no transfusions may be given to a patient on that service and no patient for elective surgery should be operated on unless they have prior credit in the bank Two exceptions to this rule will be allowed

- 1 Patients who have furnished sufficient donors to have individual blood credit should not have transfusion delayed because of a service deficit
- 2 Patients presenting bona fide emergencies may receive transfusions Blood will be debited to the service

*Red Cross Blood* Different relations with Red Cross regional banks exist in different parts of the country The hospital blood bank supervisor should be consulted for rules governing each locality

Phlebotomy for therapeutic purposes usually is not done by Blood Bank personnel although necessary equipment is furnished Such blood is not accepted in the Bank for general use

sufficient to increase the concentration by several hundred mg per 100 ml

### II HYPOGLYCEMIA

If this is the problem to be evaluated—

- 1) Obtain a fasting specimen of blood
- 2) Administer 50 ml of 50% glucose intravenously (Pediatric age group as above.)
- 3) Obtain specimens of blood at 3 4 and 5 hours  
The 3 4 and 5 hour specimens should be normal  
A full day's fast or more may at times be required in an effort to exclude organic hypoglycemia the hallmark of which is fasting hypoglycemia

### C INSULIN SENSITIVITY

Regular insulin (0.1 units/kg) may be given alone or following the administration of glucose in an effort to evaluate insulin sensitivity. This procedure is fraught with the hazards of hypoglycemia and the indications for its use are quite limited.

## 2 Congo Red Test

- A Obtain a fasting specimen of blood
- Administer 0.25 ml/kg body weight of 0.6% solution of congo red in 1 to 2 minutes
- C Obtain a minimum of 3 specimens of blood *carefully timed* from the midpoint of the injection within the first 6 minutes
- D Obtain a specimen of blood at 30 minutes. All of the postinjection specimens should be obtained from the arm opposite that of the site of administration of the dye
- E Send an aliquot of the 0.6% solution of congo red to the laboratory

This is the least ambiguous of the congo red tests. Patients with amyloid disease may remove more than 65% from the plasma whereas controls rarely remove more than 35% of the dye. The levels obtained in the first 6 minutes when plotted semilogarithmically back to zero time provide a good estimate of the initial concentration of dye when thoroughly mixed in the blood.

**COMMENTS REGARDING CERTAIN DETERMINATIONS****1 Serum Electrolytes**

The interpretation of serum electrolytes is frequently facilitated by study of the several major components namely sodium potassium  $\text{CO}_2$ , chloride and blood urea nitrogen

**2 Calcium and Phosphorus**

These determinations should ordinarily be made simultaneously together with the serum alkaline phosphatase. Because of the interrelationship of ionized and bound calcium a serum protein determination should be obtained on the same specimen of blood.

**3 Thyroid Function Studies**

Available specific tests include protein bound iodine (PBI), butanol extractable iodine (BEI), and I uptake. The basal metabolic rate and serum cholesterol content are non-specific but may be helpful in certain instances. The usefulness of the PBI and BEI may be limited by recent intravenous pyelogram (4-6 weeks), cholecystogram (6 months) or Lipiodol (perhaps years). The PBI has the additional disadvantage of spurious elevation by exposure to inorganic iodides.

**SPECIAL PROCEDURES****1 Glucose Tolerance Tests**

**A IMPAIRED CARBOHYDRATE TOLERANCE** If this problem is to be evaluated—

- 1) Obtain a fasting specimen of blood
- 2) Administer 50 ml of 50% glucose intravenously (Use 0.5 Gm glucose/kg in the pediatric age group)
- 3) Obtain a 2 hour blood specimen

A common error is to use the needle employed to aspirate the 50% glucose into a syringe for the withdrawal of the fasting specimen of blood. This seemingly minor contamination of the initial specimen of blood is

TABLE OF NORMAL VALUES

DETERMINATION	MIN. VOL. OF BLOOD NEEDED (ML.)*	NORMAL RANGE
Urea nitrogen	5	20 mg %
Glucose (Somogyi)	5	55-100 mg %
Total CO <sub>2</sub> content†		
Infant		20-25 mM/L
Adult		26-30 mM/L
Chloride	5	
Newborn		104-110 mEq/L
Adult		98-106 mEq/L
Sodium	5	132-142 mEq/L
Potassium	5	
Newborn		5.0-9.0 mEq/L
Adult		3.5-5.0 mEq/L
Total protein	5	
Newborn		5.1-5.7 Gm %
Infant		5.8-6.4 Gm %
Adult		6.0-7.8 Gm %
Albumin		3.5-5.0 Gm %
Globulin		
Infant		1.0-2.0 Gm %
Adult		2.0-3.5 Gm %
Calcium	10	
Newborn		7.5-13 mg %
Adult		9.0-11.5 mg %
Phosphorus inorganic	5	
Newborn		3.5-8.5 mg %
Infant		4.5-5.5 mg %
Adult		2.5-4.5 mg %
Bilirubin	5	
Total		Less than 0.6 mg %
BSP	5	Less than 1 mg %
		Less than 5% retention in 45 min
Serum glutamic oxaloacetic transaminase	40	8-40 units
Serum glutamic pyruvic transaminase		5-35 units
Serum iron	15	50-200 µg %
Serum iron binding capacity	15	300-350 µg %

(C. L. A.)

\* A dry full trial tube, but if possible use a separate tube for CO<sub>2</sub>

### 3 Bromsulfalein (BSP)

- A **PRINCIPLE** Removal of BSP injected intravenously depends on presentation of the dye to the liver by an adequate liver blood flow normally functioning parenchymal cells of the liver and unobstructed biliary passages
- B **METHOD** The dosage of dye is calculated using 5 mg of BSP per kg of body weight. No correction of weight for edema or ascites is necessary. An appropriate amount of dye is injected intravenously over 1 to 2 minutes with great care that no dye escapes into surrounding tissues since a painful slough of tissues may result. Rarely hypersensitivity reactions occur most often in patients who have received BSP repeatedly and when doses of more than 10 ml are used. Forty five minutes after the injection 10 ml of blood is taken from a vein in another extremity and submitted to the Clinical Chemistry Laboratory in an oiled tube
- C **INTERPRETATION** The BSP test is one of the most sensitive tests for detecting minimal liver disease. Decreased liver blood flow in patients with congestive heart failure or shock may cause retention of more than 5% of BSP in 45 minutes in the absence of parenchymal cell dysfunction. Obstruction of the biliary passages will also cause BSP retention. The technical feasibility of an adequate BSP determination is not precluded by the presence of icterus

### VALUES

The normal values for certain determinations not discussed here appear in the following table together with certain other liver function tests

# 13 Endocrine Examinations

## INTRODUCTION

The laboratory may make a significant sometimes critical contribution to the diagnosis of endocrine disorders. The number of highly specialized techniques in this area is steadily increasing. It is unlikely that the student, house officer, or practicing physician will often be one involved in the carrying out of these techniques, and a detailed discussion of the methods or interpretations is beyond the scope of this manual. The tests, however specialized, are no better than the specimens sent to the laboratory. It is the physician's responsibility when he requests such studies to assure that urine and blood collections are obtained in the manner prescribed by the local laboratory and that clean glassware is employed. Of particular importance is the timing of the specimen. A 24 hour urine specimen, which is a frequent standard of reference, should be *precisely* timed. If, despite efforts to obtain precise collections, specimens of urine are inadvertently discarded, lost in the x-ray department, or rendered faulty by any other unavoidable accident, the known factors should be carefully included in the determination and interpretation of results.

## STUDIES OF THYROID FUNCTION

Thyroid function studies are discussed in the preceding section.

## COLLECTION OF 24 HOUR URINE SPECIMENS

### 1 General

Changes in methodology frequently alter the specifications of urine collection, and one should be sure to follow the current procedure. Most determinations are carried out on an aliquot of a 24 hour specimen. Because of the large



TABLE OF NORMAL VALUES (cont.)

DETERMINATION	MIN VOL OF BLOOD NEEDED (ML) *		NORMAL RANGE
Alk phosphatase	6		
Child			3.0-13.0 units (Bodansky)
Adult			1.5-4.0 units (Bodansky)
Acid phosphatase	■		Less than 0.6 units
Cephalin cholesterol flocculation	5		0.2 ± in 48 hours
Cholesterol			
Total	5		150-250 mg %
Free	5		26-32% of total
Amylase	5		Less than 140 units
Uric acid	6		
Male			Less than 6 mg %
Female			Less than 7 mg %
Protein bound iodine	12		
Newborn			4-15 µg %
Adult			4-8 µg %
Butanol extractable iodine	12		3.5-7 µg %
I <sup>131</sup> uptake	—		15-45% in 24 hr 7-25% in 6 hr
Basal metabolic rate	—		±15%

\* Usually full centrifuge tube : about 12 ml

### 3 Pregnanediol and Pregnaninol

Compounds are relatively stable and need not be collected in any special way

## BIOASSAYS

### 1 Gonadotrophin Assay

The specimen bottle should be kept under refrigeration during collection

### 2 Pregnancy Test

The first morning urine specimen may be used for either the frog or the rabbit test. The assay measures chorionic gonadotrophin which is largely luteinizing hormone. The patient should restrict fluids from midnight and avoid taking medication during that period. The bioassay specimen should have a specific gravity of 1.020 or greater. Blood serum may also be used for this purpose.

## ACTH TEST FOR ADRENAL FUNCTION

Because of the large diurnal fluctuations in blood corticoids it is important to start the test at a standardized time such as 8:30 A.M. Twenty five ml of blood is drawn into a heparinized syringe and immediately sent to the laboratory in a special centrifuge tube. Twenty five I.U. of ACTH is added to a volume of intravenous fluids which is calculated to run at a steady rate for the next 6 hours. The last of this infusion should have run in exactly 6 hours after the test was started. At this time a second heparinized blood sample is drawn exactly as the first and sent immediately to the laboratory.

### URINE ACTH TEST

A urine specimen for 17 hydroxycorticoids should be collected on the first day and again after several days stimulation with ACTH given either as the gel or by infusion. Zinc corticotrophin is also useful as a stimulating agent. The second 24 hour specimen is collected to measure the rise in 17 hydroxycorticoids. This test lacks the standardization of the blood response test and its interpretation is frequently difficult.

diurnal variations in steroid excretion, it is important that this aliquot be obtained from a complete 24 hour specimen. The patient should be afebrile and reasonably free from stress if meaningful results are to be obtained. If liver or renal function is impaired the tests may be invalid.

## 2 Technique of Collection

The precise time of starting the collection is specified and the patient's bladder is completely emptied by voiding. *This urine is discarded.* All subsequent urine passed in the next 24 hours must be collected including a final specimen obtained *exactly* 24 hours after the start of the collection.

## 3 Precautions

- A If a patient is sent to the X-ray Department or a special clinic his bottle should accompany him and specific provisions should be made to prevent loss of urine.
- B The patient should be urged to empty his bladder before having a bowel movement. If urine and feces are mixed they may in some instances be separated by filtration or decantation.
- C If a break in urine collection occurs the 24 hour collection should be started over again but in suspected cases of endocrine tumors the partial urine collection should be labeled with the time and sent to the laboratory.
- D All urine collections should be labeled on the bottle with the times and dates of starting and stopping.

## STEROID STUDIES ON 24 HOUR URINE SPECIMENS

### 1 17 Ketosteroids

The collection should be made in a container to which 5 ml of toluene has been added.

### 2 17 Hydroxycorticoids

The specimen should be refrigerated throughout the collection and promptly dispatched to the laboratory.

# 14 Specimens for Cytology and Pathology Laboratories

## VAGINAL AND CERVICAL SMEARS

Glass slides with frosted ends and jars with fixative for the smears are supplied from the Pathology Laboratory

- 1 Before making the smears the name and unit number of the patient and the source of the specimen should be printed in lead pencil on the frosted end of each slide to be used for that patient. The same side of the slide should be used subsequently for the smear
- 2 Material may be obtained by scraping aspiration or swabbing. Use of the swab is not preferred. Always obtain the specimen before using lubricating jelly. Scraping may be carried out with a tongue blade or cervical surface biopsy scraper the specimen being obtained from the squamo columnar junction or localized lesion. If aspiration is done the material is placed on the slide from the pipette and the side of the pipette above the tapered end may be used to smear the material. If a swab is used the smear should be made by rolling the swab on the slide and not by rubbing the slide as this tends to dry the specimen and distort the cells
- 3 Immediately upon making the smears place the slides in the bottle of fixative. *The smears must not be allowed to dry.* Slides should be placed with the clean surfaces together so that smears do not face one another. These precautions permit optimal preservation of cytologic detail in the smears
- 4 These bottles with the properly filled out *cytologic examination request sheets* are sent to the Pathology Laboratory

## WATER EXCRETION TEST

The excretion of a water load is deficient in patients with adrenal cortical insufficiency. This function may be conveniently examined as follows: after fasting since the evening meal of the previous day, the patient is instructed to empty his bladder as completely as possible on the following morning. The time of voiding is noted and the patient is asked to drink a volume of water equivalent to 20 ml per kg of body weight over the next 45 minutes. The volume of urine voided during the 5 hours since the beginning of the test is measured. A normal response is the excretion of approximately 80% of the volume ingested. This test represents a simple screening method for adrenal cortical insufficiency as a normal response virtually excludes the diagnosis. However, an abnormal response may be caused by other disorders and is therefore not specific.

## BUCCAL SMEARS FOR SEX DETERMINATION

Cytologic study for the sex chromatin may be conveniently done on buccal smears. Slides should be scrupulously cleaned with acetone and ether. The lower lip is cleansed with a dry sponge before tissue is obtained by gentle scraping.

## **2 The Tissue Should Be Handled Gently**

Grasping a sample of human flesh with forceps or other instruments may completely distort the structures beyond the point of recognition. Cauterization should be avoided wherever practical. Heat coagulation may make interpretation impossible. A knife biopsy is usually preferable.

## **3 Fixation Should Be Carried Out Promptly**

For small biopsy specimens jars of 10% formalin are provided. The tissue should be promptly placed in formalin and the container fully labeled. Wrapping the specimen in gauze wet or dry may interfere with fixation. Flat tissues (e.g. skin) should be mounted on heavy absorbent paper to prevent curling during the shrinkage that occurs with fixation.

## **4 Orienting Labels Are Always Helpful**

Without obvious landmarks orientation of a detached specimen is impossible. When tissue is submitted from different sites it is imperative that *the specimens be separated and identified*.

## **5 Fill in the Indicated Information on a Surgical Pathology Request Form**

The form as submitted becomes a part of the permanent record of the study. Short cuts in submitting all of the requested information nearly always result in faulty interpretations or wasted time by all concerned with the biopsy. Such facts as the patient's age, sex, exposure to irradiation, exact site of lesion, etc., often markedly influence intelligent histologic appraisal. Carefully recorded gross observations of the lesion *in situ* are frequently of critical importance.

## **6 Deliver the Specimen and Request Slip to the Pathology Laboratory or One of the Collecting Stations**

Care regarding the foregoing steps is useless if this step is neglected.

**FLUIDS SPUTUM AND GASTRIC CONTENTS**

- 1 Early morning urine and sputum should be collected in a clean container and sent to the laboratory immediately
- 2 Twenty four hour specimens are not desirable for examination because cytolysis occurs reducing the diagnostic value of the specimen
- 3 Pleural and ascitic fluids and gastric contents should be delivered to the laboratory as soon as possible after the specimen is obtained
- 4 If it is necessary to collect a specimen after 4 00 P M it may be preserved by adding to it an equal quantity of 10% formalin or absolute ethyl alcohol and placing it in an ice box until it can be delivered to the laboratory with a cytological examination request sheet

**OBTAINING TISSUE FOR BIOPSY**

Biopsy consists of 2 major steps

- 1 Obtaining tissue for study
- 2 Gross and microscopic evaluation of morphologic changes

Since these 2 steps are usually carried out independently by different individuals close coordination between them is mandatory. Each member depends on the observations of the other in making an intelligent evaluation. For expediency in handling large numbers of cases this is accomplished by written correspondence (request slips report forms) and by mutually arranged signal systems (orienting sutures labels etc.) Most of the difficulties with biopsy procedures result from failure of accurate communication of ideas or information between the 2 groups of persons involved.

In the proper technical performance of the first step the following are the most important points to be kept in mind

- 1 **Tissue Obtained for Study Must Be Representative of the Lesion**

Necrotic tissue fragments from superficial portions of lesions and specimens that do not include the actual lesion add little to the study. It is desirable that the specimen include a portion of normal tissue as well so that anatomic relationships can be established.

# 15 Circulation Time and Venous Pressure

## CIRCULATION TIME

### 1 Principle

The circulation time is determined by injecting a foreign substance rapidly into a peripheral vein and noting the time elapsing between the injection and the arrival of the substance at some other point in the circulation. The usual method measures the arm to tongue time and employs solutions of magnesium sulfate or Decholin (sodium dehydrocholate). Volatile substances such as ether are used for estimations of the arm to lung time.

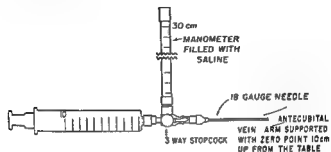
### 2 Method

The test is performed with the patient recumbent and relaxed. He must be told not to hold his breath as this may retard venous return to the heart. The nature of the end point should be explained to the patient as well as the necessity of his announcing it *immediately* by some agreed signal such as "now". After the tourniquet is applied and an 18 gauge needle inserted, the tourniquet is released and 20-30 seconds allowed to elapse to permit re-establishment of normal circulation in the vein before the injection is made. The latter must be made rapidly (in about 1 second) and the time to the end point measured precisely—with a stop watch if possible.



- 7 Except in Emergencies Allow 48 Hours for processing of tissue preparation of slides and microscopic interpretation. Urgent cases can be handled in 24 hours if requested but a rushed study is invariably inferior to a thorough one.

readings are made until they are constant. The normal range is 1-9 cm.



## 3 Material

Some of the substances commonly used are

## A MAGNESIUM SULFATE

Quantity 3 ml of a 20% solution

End point Hot sensation in tongue and pharynx.

Normal arm to-tongue time 7-17 seconds

## B DECHOLIN

Quantity 3 ml of a 20% solution

End point Bitter sensation and involuntary grimace

Normal arm to tongue time 10-16 seconds

Comment Sharp and usually reliable end point, but relatively expensive Occasional reaction

## C ETHER

Quantity 5 minims of ether and 10 minims of normal saline (14 ml paraldehyde may be substituted)

End point Facial grimace cough ether taste or smell

Normal arm to lung time 4-8 seconds

## VENOUS PRESSURE

The patient is supine and relaxed with the arm abducted to 60° to avoid compression of the axillary vein. The arm should be supported on a pillow and towels so that the antecubital vein is at a level 10 cm up from the skin of the back. (This represents approximately the level of the opening of the venae cavae into the right atrium.) The patient is instructed to relax and breathe naturally. A tourniquet is applied to facilitate venipuncture. The barrel of the syringe should be moistened with heparin to prevent clotting in the system. The 18 gauge needle is inserted cleanly into a large antecubital vein so as to obtain a free flow of blood and the tourniquet is removed. The saline filled manometer is attached in the manner shown in the following diagram and the manometer is permitted to communicate with the vein via the 3 way stop cock. The height of the column of saline when it comes to rest in the tube represents the venous pressure. Consecutive









# Index

## A

- Abdominal examination 19
- Abscesses biologic study 178
- Acid fast stain 170
- Accidents 15
  - see also* Emergency
  - pediatric 25
- Acetest 140
- Acetone test 140
- Acid gastrointestinal
  - combined 151
  - free 151
  - 5 HIAA screening test 154
  - quantitative titration 151
  - tubeless gastric analysis 151
- ACTH tests of adrenal
  - function 197
- Addis count 148
  - timed specimen for 146
- Admission note 11
- Adrenal function
  - ACTH tests
    - blood 197
    - urine 196 197
  - symptoms 16 49
  - water excretion test 198
- Agglutination tests 181
- Albumin serum
  - normal value 193
  - salt poor for
    - transfusion 188
- Ameba in stools 17
- Amylase serum normal 194
- Amyloid disease congo red
  - test in 191
- Ankle 85
- Antibody studies 181
- Anticoagulants in blood
  - studies 113
- Antigens for skin
  - tests 167-168
- Anti streptolysin O test 181

- Anus 20
  - in children 27
- Appearance of patients 17 57
  - children 26
  - psychotic 98
- Arthritis rheumatoid
  - serologic tests 181

## B

- Back 20 83
- Bacteriologic *see*
  - Microbiology c
- Bacteroides culture 171
- BEI *see* Iodine
  - butanol extractable
- Benedict's test 138
- Benzidine test 156
- Bilirubin
  - serum normal 193
  - urine tests 140
- Bioassay
  - gonadotrophins 197
  - pregnancy test 197
- Biochemistry *see* Chemistry
- Bopsy specimens 200-207
- Birth and early
  - development 15
  - pediatric 25 61-71
- Blastomycosis
  - antigen 167
  - complement fixation 181
- Bleeding time 179 135
- Blood
  - see also* Hemopoietic
  - Plasma and Serum
  - antibody studies 180
  - bacteriologic study 171
  - bank 184
  - cells
    - see also* Red and
    - White blood cells
  - reticulocytes 122 134



*Blood (cont.)*

- sickle cells 122
- chemistry deter-
  - minations 189-194
  - in comatose 110
- circulation time 203
- clot retraction 128 135
- coagulation time 128 135
  - with prothrombin deficiency 130
- collection 113
- cultures 171
  - in comatose 110
- for direct examination 171
- for fat absorption test 152
- fibrinolytic activity 178 135
- film wet 123
- hemoglobin 115-117 134
  - fetal 134 159
- platelet count 123 135
- procedures 113-130
- serologic tests 180-181
- smear
  - dry 120-122
  - wet 123
- in stool—tests for 156 158
  - fetal and adult Hgb in 159
- for virus studies 182 183
- Blood transfusion
  - donors 188
  - obtaining and handling of blood 184
  - reactions 185-187
- Blood vessels
  - of neck 19
  - peripheral 20 46 48
- Bone marrow
  - aspiration 130-133
  - normal values 136
- Bradford swabs 171
- Breasts 16 19 47
- Brecher method 123
- Bromsulfalein test 192
  - normal value 193
- Bronchial secretions
  - for culture 174
  - for cytologic study 200
- Brucellosis
  - agglutination 181
  - culture 171

- BSP test 192
- Buccal smear 198
- BUN *see* Urea nitrogen
- Butter fat absorption test 152

## C

- Calcium determinations
  - in serum 190
  - normal values 193
  - in urine—Sulkowitch test 143
- Capillary fragility 135
  - detection 129
- Carbohydrate impaired tolerance—test 190
- Carbon dioxide blood 190
  - normal values 193
- Cardiovascular *see* Circulatory
- Cat scratch disease
  - antigen 168
- Cephalin cholesterol flocculation 194
- Cerebral localization 78-80
- Cerebrospinal fluid
  - studies 160-164
    - bacteriologic 164 170 175
    - India ink for fungi 164
    - stained smear 164 170
  - cell counts
    - differential 162
    - total 161
    - red 161 162
    - white 161
  - colloidal gold curve 164
  - color 161
  - in comatose patient 110
  - cryptococcus studies 175
  - cultures 175
  - cytology 161
  - dynamics 160
  - glucose tests
    - quantitative 163
    - semiquantitative (Benedict) 163
  - gross 161
  - lumbar puncture 160
    - in comatose patient 110
  - Pandy test 161 162
  - pressures 160
  - protein content
    - Pandy test for globulin 162

- quantitative 169
  - quantity required 160
  - sypilis tests 164
  - tuberculosis studies 170
  - turbidity 161
    - for virus studies 189
  - Cervical smear 199
  - Charts *see* Notes
  - Chemistry determinations
    - blood 189-194
      - normal values 193
      - specimens for 189
    - urine
      - routine 137-140
      - special 140-143
  - Chest *see* Respiratory
  - Chief complaint 14
    - pediatric 23
  - Childhood diseases 15 25
  - Children
    - evaluation of 22-27 61-71
  - Chloride blood 190
    - normal values 193
  - Cholesterol serum 190
    - normal values 194
  - Choriomeningitis lympho-
    - cytic complement fixation 181
  - Circulation time 203
  - Circulatory system 16 46
    - blood circulation time 200
      - material for 204
    - in comatose patient 103 106
    - heart examination 19
    - with injury 87
    - venous pressure 204
  - Clinical graphs 36-37
  - Clinitest method 139
  - Christix method 139
  - Clot retraction 128 135
  - Coagulation time 128 130
  - Coccidiodomycosis
    - antigen 167
    - complement fixation test 181
    - precipitin test 181
  - Colloidal gold curve
    - CSF for 164
  - Comatose patient 103-110
    - emergencies 87
    - lumbar puncture in 110
  - Concentration tests
    - renal 144
  - Congo red test 191
  - Constitution 17 52 53
  - Cranial nerves 21 73-75
  - Cryoglobulin tests 127 180
  - Cryptococcus studies
    - in CSF 175
  - CSF *see* Cerebrospinal fluid
  - Cultures of biologic
    - specimens 171-179
  - Cyanmethemoglobin 115
  - Cytology specimens 199-202
    - biopsy 200
    - buccal 198
    - cerebrospinal fluid 161
    - cervical and vaginal 199
    - exudates and transudates 200
    - gastric 159 200
    - sputum 200
    - urine 200
- D
- Damashek technique 123
  - Darkfield examination 179
  - Decholin for circulation
    - study 204
  - Development 13
    - pediatric 23 61-71
  - Diabetes mellitus 49
  - Diagnex blue 151
  - Diet *see* Nutrition
  - Diphtheria culture for 172
    - toxin 168
  - Discharge summary 12
  - Drugs taken
    - by comatose or stuporous 104
    - regularly 15
  - Duodenal contents
    - examinations 150-159
- E
- Ears
    - culture of
      - specimens 171 172
    - examination 15 18 44
    - neurologic aspects 74
  - Echinococcus
    - antigen 168

- Echinococcus (*cont.*)  
     complement fixation 181  
 Ehrlich's aldehyde method 134  
 Elbow 85  
 Electrolytes (serum) 190 193  
 Emergency examination 86-87  
     of comatose or  
         stuporous 103-110  
 Encephalitis St Louis  
     complement fixation 181  
 Encephalomyelitis equine  
     complement fixation 181  
 Endocarditis subacute bacterial cultures for 171  
 Endocrine system  
     laboratory tests 190 195-198  
     urine collection for 195  
     symptoms 16 49 80  
 Enterobius vermicularis  
     specimen for study 178  
 Erythrocytes *see* Red blood cells  
 Escherichia coli stool specimens  
     for study 176  
 Ether for circulation  
     study 204  
 Extremities *see*  
     Musculoskeletal  
 Exudates *see* Pus and  
     exudates  
 Eyes 15 18 44  
     culture specimens from 179  
     neurologic aspects 73
- F**
- Family history 14 39-40  
     pediatric 23 f  
 Fat  
     absorption test 159  
     in stool 157  
 Feces *see* Stool  
 Feet 20 85  
 Fever—blood tests in  
     Q 181  
     rat bite 171  
     relapsing 171  
     Rocky Mt spotted 181  
     of unknown origin 181  
 Fibrinogen 135  
 Fibrinolytic activity 198 135
- Foam test for bilirubin 140  
 Fragility  
     capillary 135  
     detection 129  
     red cell osmotic 134  
     test 196  
 Fres test antigen 168  
 Fundus oculi 18  
 Fungus studies  
     in CSF 175  
         India ink preparation 164  
     in larynx 172  
     in oropharynx 172  
     in pus 199  
     skin test antigens 167  
     in transudates 175  
     in wet smears with KOH 171
- G**
- Gait 79 73  
 Gastric contents 150-155  
     acidity  
         combined acid 151  
         free acid 151  
         quantitative titration 151  
         tubeless analysis (Diagnex blue) 151  
     analysis 150-152  
     pH 151  
     quantitative titration of acidity 151  
     tubeless analysis (Diagnex blue) 151  
     appearance 150  
     collection method 150  
     cytologic study specimens for 159 200  
     washings  
         culture for  
             *M. tuberculosis* 174  
             of comatose patient 110  
 Gastrointestinal function  
     16 46  
     butter fat absorption test 152  
     5 HIAA screening test 154  
     secretin test 154  
     xylose tolerance test 154  
 Genetics *see* Family history

- Genitalia 20  
     *see also* Reproductive  
     of children 27
- Gentian violet stain 170
- Globulin  
     in CSF Pandy test  
         161 162
- Glucose  
     in blood 190  
         normal 193
- in CSF—tests  
         quantitative 163  
         semiquantitative  
         (Benedict) 163
- tolerance tests 190–191  
         carbohydrate  
         impaired 190  
         hypoglycemia 191  
         insulin sensitivity 191
- in urine—tests 138  
         Benedict's 138  
         Clinitest 139  
         glucose oxidase  
         paper 139
- Gonadotrophin assay 197
- Gonorrhea  
     *see also* Neisseria  
     complement fixation 181  
     in history 47
- Gower's solution 118
- Graham swab 178
- Gram stain 170  
     of urine sediment 148
- Graphs  
     clinical 36–37  
     correction of sedimentation  
         rate 175
- Growth and development  
     61–76  
     pediatric 25  
     postnatal and early 15
- Guaiac test 157

## II

- Habits 15
- Hair 15 16 17 43 49
- Hand 86
- Harrison spot test 140
- Head 15 III 43  
     of children 6

- of comatose or stuporous  
         108 109
- injuries 43 72
- Hearing 15 18 44  
     neurologic aspects 74  
     perception 81
- Heart examination 19
- Hemagglutination tests  
     on blood 181  
     against urinary  
         organisms 149
- Hematin 116
- Hematocrit Wintrobe  
     techniques 114
- Hematologic studies 115–130  
     *see also* Blood
- Hemocytometer care of 117
- Hemoglobin estimation  
     115–117  
     colorimetric method 116  
     fetal 134  
     in newborn stool 159  
     normal value 134  
     mean corpuscular (MCH)  
         119 134  
     concentration (MCHC)  
         119 134  
     volume (MEV) 119 134  
     normal values 134  
     photometric method 115  
     Sahli method 116
- Hemopoietic system 16 48  
     *see also* Blood
- Hemostasis 178
- 5 HIAA screening test 174
- Hips 84
- Histoplasma  
     antigen 167  
     complement fixation 181
- History taking *see* Table of  
     Contents
- Hydration 17
- 5 Hydroxyindole acetic acid  
     screening test 154
- 17 Hydroxysteroids 196  
     ACTH test 197
- Hypoglycemia test 191

## I

- Icterus index 115
- Immunization 15 75

- India ink preparation for  
fungi in CSF 164
- Infections 15  
in children 25  
clinical graph of 36  
in comatose patients 106
- Influenza complement  
fixation 181
- Injuries 15  
emergency examination  
86-87  
of comatose or  
stuporous 104 107  
of head 43 72  
of spine 72 86
- Insulin sensitivity test 191
- Interviewing 28-33
- Iodine serum  
butanol extractable 190  
normal values 194  
protein bound 190  
radioactive ( $I^{131}$ )  
uptake 190
- Iron serum (normal)  
135 193  
binding capacity 193

## K

- Kala azar blood studies  
for 171
- Ketones in urine test 142
- 17 Ketosteroids 196
- Kidney  
concentration tests 144  
function tests 143-145
- Knee 84
- KOH preparations 170

## L

- Larynx culture specimens  
171 172
- LE phenomenon test 126
- Lee White method 128
- Leptospirosis  
agglutination 181
- Leukocytes *see* White blood  
cells
- Living arrangements 12 42  
pediatric 24
- Lumbar puncture 160  
in comatose patients 110

- Lungs *see* Respiratory
- Lupus erythematosus  
*see* L E
- Lygranum antigen 168
- Lymph nodes 17
- Lymphogranuloma venereum  
complement fixation  
181

## M

- Macroglobulins test for 127
- Magnesium sulfate for  
circulation study 204
- Malabsorption syndrome  
tests for 152-153
- Malaria blood studies  
for 171
- Marital history 14 40
- Mastoid culture specimens  
171 172
- MCH calculation 119 134
- MCHC calculation 119 134
- MCV calculation 118 134
- Mean corpuscular hemoglobin  
(MCH) 119 134  
concentration (MCHC)  
119 134  
volume (MCV) 119 134
- Measurements  
of children 26  
orthopedic ■
- Medical history  
past 15  
pediatric 24-26  
preparation of 32
- Medications taken  
by comatose or  
stuporous 104  
regularly 15
- Memory 17 72  
of psychotic patient 101
- Menarche 16 47
- Menopause 16
- Menses 16 47
- Mental status 15 17  
of comatose patient 110  
examination 97 98-103
- Metabolism  
basal rate 190  
normal 194  
disease in comatose 102

- examination 16 48
- Methylene blue stain 170
- Microbiologic examinations 169-178
  - blood 171
  - bronchial secretions 173
  - cerebrospinal fluid 164 174
  - eyes 172
  - fresh preparations 169
  - gastric washings for
    - M. tuberculosis* 174
  - general principles 169
  - KOH preparations 170
  - nasopharynx 171
  - pus 171 178
  - smears
    - stained 169-170
    - wet 170
  - specimen preparation 171-179
  - sputum 173
  - stool for ova and parasites 157 177
  - transudates 175
  - urine 145 146-149 176
- Military service 14 41
- Mononucleosis infectious
  - heterophile agglutination 181
- Mouth 16 18 45
- Mumps serologic test 181
- Muscle fibers in stool 158
- Musculoskeletal examination 16 48 82-86
  - ankle 85
  - back 20 88
  - children 27
  - elbow 85
  - extremities 20 82 84-86
    - of children 27
  - neurologic aspects 75-76
  - feet, 20 85
  - hands 86
  - hip 84
  - joints
    - infection 179
    - mobility 82
  - knee 84
  - orthopedic 82-86
  - neurologic aspects 75
  - shoulder 85
  - spine 20 84
  - voluntary motor system 75
  - wrist 86
- Mycobacterium tuberculosis*
  - in CSF 175
  - in gastric washings 174
  - in pus 178
  - in sputum 174
  - in throat 172
  - in transudates 166 175
  - in urine 149 178
- N
- Nails 15 17 43
- Nasopharynx culture
  - specimens 171 172
- Neck 19
- Neisseria
  - in blood cultures 171
  - complement fixation 181
  - in joint specimens 179
  - in pharyngeal cultures 172
- Nerves cranial 21 73-75
- Nervous system 21 72-82
  - autonomic 21 78
  - disease in comatose 105
- Neurologic examination on
  - 16 21 48 72-82
  - in comatose patient 105 109
  - in emergencies 87
  - reflexes 21 77 83-86
- Nitrazine paper for
  - gastric pH 151
- Nodes lymph 17
- Normal values (hematologic)
  - 134 135
  - chemistry 193
- Nose 16 18 45
  - culture specimens 171 172
- Notes
  - admission 11
  - clinical graphs 36-37
  - operative 12
  - progress 12
  - surgical 12
- Nutrition 17 48
  - of children 25
  - history taking 58-61
  - meal pattern and food list 60

## O

- Occupation 14 15 41  
 of child & parents 24  
 in past 15  
 in present history 12  
 Operative notes 12  
 Orientation of patient 17 72  
 of psychotic 101  
 Orthopedic examination  
 82-86  
*see also* Musculoskeletal  
 history 83  
 Osmotic fragility test 176  
 Ova and Parasites in stool  
 157 177-178  
 specimens for 157 177

## P

- Pancreatic function  
 secretin test 154  
 stool with deficiency 15b  
 trypsin test 158  
 Pandy test 161 162  
 Parasites *see* Ova  
 Parathyroid dysfunction 49  
 Paratyphoid agglutination  
 test 181  
 Past history 15  
 pediatric 24-26  
 PBI *see* Iodine protein bound  
 Pediatric history 22-27  
 Pelvic examination conduct  
 of 52  
 Pericardial fluid examinations  
 165-166 175  
 bacteriologic 166 175  
 cell counts 166  
 differential 166  
 collection for 165  
 culture 175  
 cytologic 166 200  
 for fungi 175  
 gross 165  
 protein content 165  
 smear 175  
 specific gravity 165  
 for tuberculosis 166 175  
 Peritoneal fluid examinations  
 165-166 175  
 bacteriologic 166 175  
 cell counts 166  
 differential 166  
 collection for 165  
 culture 175  
 cytologic 166 200  
 for fungi 175  
 gross 165  
 protein content 165  
 smear 175  
 specific gravity 165  
 for tuberculosis 166 175  
 Pertussis culture for 172  
 pH  
 of gastric contents 151  
 of urine 137  
 Pharynx *see* Throat  
 Phenolsulfonphthalein  
 test 143  
 Phlebotomy 188  
 Phosphatase  
 acid normal 194  
 alkaline normal 194  
 Phosphorus blood 190  
 normal values 193  
 Photometric hemoglobin  
 estimation 115  
 Physical examination 11  
 basic outline 13 15-21  
 of children 26 f  
 general 13 51-54  
 Physician patient relationship  
 28-33 51 f 56  
 Physique *see* Constitution  
 Pinworms specimen for  
 study 178  
 Pipettes for blood studies  
 care of 117  
 Pituitary gland 49 80  
 Plasma  
*see also* Serum  
 clotting time 128 135  
 fibrinogen 135  
 for transfusion 188  
 Platelet counts  
 direct method 123 135  
 indirect method 123 135  
 normal values 135  
 in stained dry smears 121  
 in Wintrobe tube 115  
 Pleural fluid examinations  
 165-166

- bacteriologic 166 175
  - cell counts 166
    - differential 166
  - collection for 165
  - culture 175
  - cytologic 166 200
  - for fungi 175
  - gross 165
  - protein content 165
  - smear 175
  - specific gravity
    - for tuberculosis 166 175
  - Pneumococcal septicemia*
    - culture for 171
  - Pneumonia atypical serologic tests* 181
  - Poison Control Centers 88-96
  - Poisoning 88
  - Porphobilinogen test 141
  - Posture 17 20 52 79
    - of psychotic patients 98
  - Potassium
    - KOH preparations 170
    - serum 190
      - normal values 193
  - Pregnancy
    - history of 16 47
    - in pediatric history 74
    - test 194
  - Pregnanediol
    - determination 197
  - Pregnantrol
    - determination 197
  - Present illness 14 33-38
    - pediatric 23
  - Progress notes 12
  - Protein
    - c reactive—tests 180
    - in CSF—tests 162
    - serum
      - abnormal—tests 127
      - normal values 193
    - in transudates 164
    - in urine—tests 137 145
      - Bence Jones 138
      - heat and acetic acid 137
      - quantitative 146 148
      - sulfosalicylic acid 138
  - Prothrombin time 129 135
    - utilization 135
  - Psittacosis complement
    - fixation 181
  - PSP test 143
  - Psychologic observations 16
    - 17 42 50 52 53 72
    - in children 26
    - in comatose patient
      - 106 110
    - in psychotic patient 98-103
    - related to nutrition 59
  - Psychomotor functions
    - 17 80-81
  - Psychosexual adjustment 50
  - Psychotic patient
    - examination 98-103
  - Pus and exudates
    - culture 178
    - staining 170
    - in stools 158
    - in wet smears 170
  - Pyarthroses microbiologic
    - study 178 179
- Q
- Q fever serologic tests 181
  - Quesnel Stain 178
- R
- Rat bite fever blood
    - studies for 171
  - Records medical 11
  - Rectum 20
    - in children 27
  - Red blood cells
    - in bone marrow 136
    - in CSF 161 162
    - count 117 118 134
    - indices—calculations
      - 118-119
      - MCH 119
      - MCHC 119
      - MCV 118
    - normal values 134
    - nucleated 134
      - estimation of 119
    - osmotic fragility 134
      - test 126
    - packed volume ( $V_p$ )
      - 114 125
      - normal 118 134
    - sedimentation rate 124



- Red Blood Cells (cont)**  
     observed and corrected  
         125 135  
     in stained dry smears 121  
     in urine 140 145  
     volume  
         average (MCV)  
             118 134  
         packed (Vc)  
             114 125 134  
**Red Cross blood banks** 188  
**Reflexes** 21 77 83-86  
**Relapsing fever** blood  
     studies for 171  
**Relatives** 32  
     of comatose patient 104  
     of pediatric patient 24  
     of psychotic patient 97  
     of uncooperative patient  
         104  
**Religion** 14 41 59  
**Renal function tests** 143-149  
**Reproductive system**  
     16 47 49  
     bioassays 197  
     genitalia 19  
         of children 27  
     psychosexual adjustment 50  
     steroid determinations 196  
**Respiratory tract** 16 43  
     chest 19  
     in comatose patient 106  
     emergencies 87  
     lungs 19  
**Reticulocyte count** 122 134  
**Review of systems**  
     15-16 43-50  
     pediatric 24-26  
**Rocky Mt spotted fever**  
     serologic tests 161  
**Rumpel Leede**  
     phenomenon 129
- S**
- Sabli hemoglobin method** 116  
**Salicylates in urine** test 142  
**Salmonella culture** 176  
**Scalp** 18  
**Schick test** 168  
**Schooling** 14 41  
**Secretin test** 154  
**Sedimentation rate (RBC)**  
     124 135  
     correction graph 125  
**Sensation** 21  
     examination for 76  
**Sensitivity microbiologic** 179  
**Sentorium** 17 73  
     of psychotic patient 101  
**Serum**  
     *see also* Plasma  
     albumin salt poor for  
         transfusion 188  
     antibodies against urinary  
         organisms 149  
     chemistries 190  
     electrolytes 190 193  
     proteins  
         abnormal--tests for 197  
         normal values 193  
     sodium 190  
         normal values 193  
**Sex determination** from  
     buccal smears 198  
**Shigella culture** 176  
**Shoulder** 85  
**Sia water test** 177  
**Siblings** 14 40  
**Sickle cells** 122  
**Sinuses paranasal** 16 18 45  
     culture specimens 171 172  
**Skin** 15 17 43  
     of comatose or  
         stuporous 107  
     testing 167 168  
         antigens for 167  
         in pediatric history 25  
         procedure (general) 167  
         specific 167-168  
**Skull** 18  
     of comatose patient  
         108 109  
**Smears**  
     *see also* Staining techniques  
     blood  
         stained dry 120-122  
         wet 123  
     of bone marrow 133  
     buccal for sex  
         determination 198  
     cervical 199

- of CSF 164 170
- of sputum 173
- of transudates 166
- of urine sediment 170
  - Gram stained 148
- vaginal 199
- Socio environmental
  - history 14 41-43
  - and nutrition 59
  - pediatric 24
- Sodium serum 190
- normal values 193
- Speech 17
  - neurologic aspects 80 81
  - of psychotic patient 99 102
- Spine 20 84
  - injuries 79 86
  - lumbar puncture 160
    - in comatose patient 110
- Sputum examination
  - culture 173
    - for fungi 174
    - for *H. pertussis* 174
    - for *M. tuberculosis* 174
    - specimens for 173
  - cytologic 200
  - stained smears 173
  - wet smear and KOH 170
- Staining techniques 148 170
  - acid fast 170
  - brilliant cresyl blue 123
  - gentian violet 170
  - Gram 170
    - of urine sediment 148
  - methylene blue 170 181
  - Quesnel 178
  - Sudan III or IV for stool fat 157
  - Wrights 121 133
- Staphylococcus cultures 176
  - in stool 176
- Steroid determinations 196
- Stomach *see* Gastric contents
- Stool examination 156-159
  - appearance 156
  - bacteriologic 176
  - for blood cells 158
  - for blood (occult)
    - benzidine test 156
    - guaiac test 157
  - bloody of newborn—
    - differentiation of fetal and adult Hgb 159
  - collection of specimen 156 176 177
  - culture 176
    - for fat in 157
    - microscopic 157-158 176-178
    - for muscle fibers 158
    - for ova and parasites 177
    - specimens for 157 177
  - in pancreatic deficiency 156
    - trypsin test 158
  - parasitologic 177
    - for pus cells 158
    - trypsin test 158
    - virus study 189 183
- Streptococci
  - culture 172
  - serologic tests for 181
- Strongyloides specimens for 177n
- STS *see* Syphilis
- Stuporous patient 103 110
  - emergency examination 87
- Sugar *see* Glucose
- Sulkowitch test 143
  - solution 143
- Swabs
  - Bradford 171
  - Graham 178
- Synovial fluid examinations 164-166 175
  - bacteriologic 166 175
  - cell counts 166
    - differential 166
  - collection for 165
  - culture 175
  - cytologic 166 200
  - for fungi 175
  - gross 165
  - protein content 165
  - smear 175
  - specific gravity 165
  - for tuberculosis 166 175
- Syphilis
  - blood tests 181
  - CSF tests 164
    - quantity required 164
  - patient's history of 47

- Syphilis (*cont*)  
   treponema complement fixation 181  
 Systems review *see* Review of systems  
  
     **T**  
 Teeth 16 18 45  
 Tes Tape method 139  
 Throat 16 19 45  
   specimens for  
     culture 171 172  
     virus studies 187  
 Thromboplastin time 135  
 Thyroid gland  
   disturbances—symptoms 49  
   examination 19  
   function studies 190  
   normal values 194  
 Tongue 18 45  
 Topfer's reagent for gastric pH 151  
 Tourniquet test 129  
 Toxoplasma methylene blue test 181  
 Trachea 19  
 Transaminases serum  
   normal values 193  
 Transudates examinations of 165-166 175 200  
 Treponema complement fixation 181  
 Trichina  
   antigen 167  
   complement fixation 181  
 Trypsin in stool 158  
 Tsuchiya's reagent 148  
 Tuberculin test 167  
 Tuberculosis studies  
   in CSF 175  
   enteric 171  
   in gastric washings 174  
   in larynx 172  
   in oropharynx 172  
   in pus 178  
   in transudates 166 175  
   in urine 149 176  
 Tularemia agglutination 181  
 Typhoid agglutination test 181  
 Typhus murine serologic tests 181  
  
     **U**  
 Uncooperative patient 103-110  
 Urea nitrogen blood 190  
   normal value 193  
 Uric acid normal 194  
 Urinary system 16 46  
 Urine  
   acetone test 140  
   appearance 137  
   bacteriologic study 145 146-149  
   antibody studies 149  
   count of flora 119  
   culture 148 149 176  
   gram stain 140 170  
   smears for acid fast organisms 176  
   specimens for 146-147  
   bilirubin tests 140  
   calcium—Sulkowitch test 143  
   cells in 140 145  
     Addis count 148  
   collection of specimens 146-148  
   catheterization 147  
   clean catch 146  
   cystoscopic 147  
   random voided 146  
   timed 146  
   of comatose patient 109  
   concentration tests 144  
   culture 148 149  
     for tuberculosis 176  
   for cytologic study 200  
   for endocrine studies 195  
   examinations 137-149  
     bacteriologic 145-149  
     chemical tests (special) 140-143  
     microscopic 139  
     routine 137-140  
     special 145-149  
   for gastric analysis 5 HIAA screening test 154

- tubeless for free acid 151  
 xylose tolerance test 153  
 glucose—tests 138  
   Benedict's 138  
   Cline test 139  
   glucose oxidase  
     paper 139  
 ketones—test 142  
 pH 137  
 phenolsulfonphthalein  
   test 143  
 porphobilinogen test 141  
 protein tests 137 145 148  
   Bence Jones 138  
   heat and acetic acid 137  
   quantitative 146 148  
   sulfosalicylic acid 138  
 salicylates—test 142  
 smear of sediment 170  
   Gram stained 148  
 specific gravity 137  
 sugar 138  
 tuberculosis studies  
   149 176  
 urobilinogen test 141  
   aldehyde separation 141
- V
- Vaginal discharge  
   microscopic study 170  
 Vaginal smears 199  
 Venereal disease 16 47  
 Venous pressure 204
- Vincent's organisms  
   cultures for 172  
   staining for 170  
 Virus studies specimens  
   for 182  
   handling 183  
 Vision 15 18 44  
   neurologic aspects 73  
   perception 81
- W
- Wallace Diamond  
   method 141  
 Water excretion test 198  
 Weil Felix reaction 181  
 White blood cells  
   anticoagulant effects 114  
   in bone marrow 136  
   in cerebrospinal fluid 161  
   count 117 119 134  
     differential 127 134  
   normal values 134  
   packed volume in Wintrobe  
     tube 115  
   in stained dry smears 121  
   in urine 140 145  
 Wintrobe Landsberg  
   technique 124  
 Wright's stain 171 133  
 Wrist 86
- X
- Xylose tolerance test 153